# HITO REPORT

## APAC
## Labor Market
## Status Survey
## 2019

Survey Results Ⅰ
### Working Conditions &
### Workplace Environment
Under what conditions, and in what workplace environments, are people working?

Survey Results Ⅱ
### Growth Through Work
What do people think about growth through work?

Survey Results Ⅲ
### Employment Awareness &
### Intention to Change Jobs
What do people think about their work?

# Introduction

Asia has enjoyed remarkable progress over the past half century. The region first achieved rapid economic growth in the 1960s and has continued to lead the world economy ever since.  In recent years, many foreign companies have been expanding into the Asian market with the region serving as the production center for the world.

On the other hand, the demographics underpinning economic growth in Asia since the 1970s are showing signs of decline in some countries and regions where low birth rates and aging populations have begun intensifying competition for human resources. How foreign companies find and hire local talent and gain the most from their skills will prove to be important. It is vital to refine hiring and training strategies that take into account local labor practices as well as the motivations and characteristics of workers.
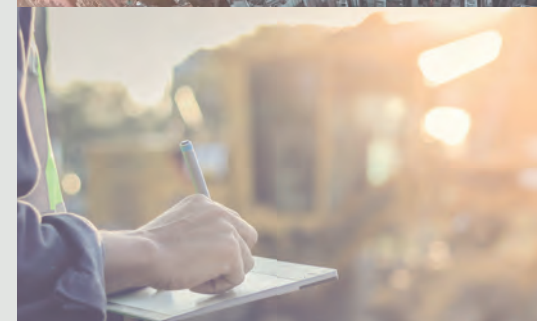
Copious labor statistics have been tabulated by the ILO and national governments identifying factors such as workforce population, labor participation rate, unemployment rate, working hours and wages. However, survey data covering work motivation, organizational culture and the management behavior of superiors is scarce. In many cases, this kind of subjective data can only be gained through anecdotes and examples from experienced local staff.

Thus, PERSOL RESEARCH AND CONSULTING has developed an online survey aimed at objectively and comprehensively assessing organizational culture, employment status and growth awareness in 14 Asia-Pacific (APAC) countries and regions. It is natural for discrepancies to appear in the results, even within the same country, due to respondent bias in the survey method, the lifestyles and education levels of respondents in different areas, and religious differences. However, we have compiled the survey results as a useful reference for business people currently struggling or hoping to start a local business in an APAC country/region.

In addition to an analysis and report on the survey results by our researchers, this volume gathers the insights and anecdotes of local expatriates and staff members at PERSOL Group companies and offices in the APAC region.

This volume may only present a partial glimpse of APAC employment conditions, but we hope it will be of use to your future local business and operations in the region.

PERSOL RESEARCH AND CONSULTING

## INDEX

# APAC Basic Information

| | | Workforce population | Labor participation rate | Number of workers | Employment rate | Unemploy-ment rate | Working hours (weekly average) | Wages (average monthly income) converted to dollars*1 | GDP growth rate*2 |
|---|---|---|---|---|---|---|---|---|---|
| ❶ | Japan | 68,300,000 people (2018) | 61.5% (2018) | 66,640,000 people (2018) | 60.0% (2018) | 2.4% (2018) | 39 hours (2017) | 304,300 JPY (2017) 2,811 USD | 0.8% |
| ❷ | China | 806,860,000 people (2017)*3 | 68.9% (2017)*3 | 776,400,000 people (2017) | 67.9% (2017) | 3.9% (2017) | 46 hours (2016) | 5,631 CNY (2016) 815 USD | 6.6% |
| ❸ | Hong Kong | 3,955,000 people (2017) | 61.1% (2017)*4 | 3,833,000 people (2017) | 59.0% (2016) | 3.1% (2017) | 45 hours (2017)*5 | 15,500 HKD (2017)*5 1,969 USD | 3.0% |
| ❹ | Korea | 27,580,000 people (2017) | 63.0% (2017) | 26,552,000 people (2017) | 60.7% (2017) | 3.7% (2017) | 43 hours (2017) | 3,446,000 KRW (2017) 2,893 USD | 2.7% |
| ❺ | Taiwan | 11,876,000 people (2018) | 59.0% (2018) | 11,435,000 people (2018) | 56.8% (2018) | 3.7% (2018) | 42 hours (2017)*6 | 49,989 TWD (2017)*7 1,620 USD | 2.6% |
| ❻ | Indonesia | 128,143,000 people (2017) | 67.0% (2017) | 122,781,000 people (2017) | 64.2% (2017) | 4.2% (2017) | 43 hours (2017)*8 | 1,818,033 IDR (2015) 129 USD | 5.2% |
| ❼ | Malaysia | 15,007,000 people (2017) | 68.0% (2017) | 14,496,000 people (2017) | 65.6% (2017) | 3.4% (2017) | 47 hours (2017)*9 | 2,463 MYR (2016) 589 USD | 4.7% |
| ❽ | Philippines | 41,390,000 people (2017) | 59.1% (2017) | 40,334,000 people (2017) | 57.6% (2017) | 2.6% (2017) | 41 hours (2017) | 12,647 PHP (2017) 242 USD | 6.2% |
| ❾ | Singapore | 2,270,000 people (2017) | 67.7% (2017) | 2,175,000 people (2017) | 64.9% (2017) | 3.1% (2017)*10 | 43 hours (2017) | 4,232 SGD (2017) 3,087 USD | 3.2% |
| ❿ | Thailand | 38,158,000 people (2017)*11 | 68.1% (2017)*11 | 37,545,000 people (2017)*11 | 67.8% (2016) | 1.2% (2017)*11 | 44 hours (2017) | 13,878 THB (2017) 443 USD | 4.1% |
| ⓫ | Vietnam | 54,829,000 people (2017) | 76.3% (2017) | 53,703,000 people (2017) | 74.7% (2017) | 2.1% (2017) | 40 hours (2017) | 5,371,754 VND (2017) 232 USD | 7.1% |
| ⓬ | India | 393,818,000 people (2012) | 51.6% (2012) | 383,225,000 people (2012) | 50.2% (2012) | 2.7% (2012) | 46 hours (2010)*12 | 6,742 INR (2012)*13 97 USD | 7.1% |
| ⓭ | Australia | 13,288,000 people (2018) | 65.6% (2018) | 12,584,000 people (2018) | 62.2% (2018) | 5.3% (2018) | 33 hours (2017) | 5,006 AUD (2016)*14 7,205 USD | 2.8% |
| ⓮ | New Zealand | 2,754,000 people (2018) | 70.7% (2018) | 2,635,000 people (2018) | 67.7% (2018) | 4.3% (2018) | 33 hours (2017) | 4,760 NZD (2017) 7,230 USD | 3.0% |

More detailed information can be found on the "PERSOL HR DATA BANK in APAC" website.

https://rc.persol-group.co.jp/hr-data/en/

# Survey Overview

This survey was an online quantitative survey targeting survey monitors on themes of employment and growth awareness in the Asia-Pacific (APAC) region. The survey targeted workers living in major cities in 14 APAC countries/regions, with a total of 14,000 sample responses compiled and analyzed.

When reading and interpreting the results of such surveys, it is important to gain a thorough understanding of the respondents' demographics. For online surveys in particular, respondent demographics have an impact because only some of the target population in the surveyed countries/regions are surveyed, depending on conditions.

This page presents profiles of this survey's respondents. Before reading the survey results, please read this section. In addition, it is possible that differences may arise in ways of understanding and awareness of organizations and management, depending on occupation. For this reason, at the analysis stage, a comparative analysis of only managers (excluding director-level positions and above) was also conducted. However, since there was no significant difference from overall trends, this paper presents only the overall results.

| Survey name | PERSOL RESEARCH AND CONSULTING "APAC Labor Market Status Survey (2019)" |
|---|---|
| Survey objectives | Identifying the actual working situations and awareness of people in major cities in 14 APAC countries, their awareness of work, job changes, and growth through work. Also, gaining an understanding of the impact of work at a Japanese company, and countries that workers want to work in. |
| Survey method | Online quantitative survey targeting survey monitors |
| Survey period | February 6 to March 8, 2019 |
| Survey target area | 14 APAC countries/regions (major cities) <br> [ East Asia ] China (Beijing, Shanghai, Guangzhou), Hong Kong, Korea (Seoul), Taiwan (Taipei), Japan (Tokyo, Osaka, Aichi)* <br> [ Southeast Asia ] Indonesia (Jakarta), Malaysia (Kuala Lumpur), the Philippines (Metro Manila), Singapore, Thailand (Bangkok), Vietnam (Hanoi, Ho Chi Minh City) <br> [ South Asia ] India (Delhi, Mumbai) <br> [ Oceania ] Australia (Sydney, Melbourne), New Zealand <br> *For Japan (Tokyo, Osaka, Aichi), 1,000 samples that met the conditions were extracted from the "Fixed point survey of employment and growth in 10,000 working people in 2019," conducted separately (online survey, February 2019) |
| Number of samples | 1,000 samples for each country/region | Allocation | Equal allocation by gender and age |
| Eligibility requirements | ・Men and women, age 20-69 years <br> ・People who are working (excluding leaves of absence) <br> ・Resident in the target country/region for 3 years or more | Survey implemented by | PERSOL RESEARCH AND CONSULTING |

## ▶ What is your age?

SS=Sample Size (number of respondents)

| | | 20s (ss) | 30s (ss) | 40s (ss) | 50s (ss) | 60s (ss) | Average Age (years) | Male (ss) | Female (ss) | Male (%) | Female (%) |
|---|---|---|---|---|---|---|---|---|---|---|---|
| East Asia | Japan | 200 | 200 | 200 | 200 | 200 | 44.4 | 500 | 500 | 50.0 | 50.0 |
| | China | 200 | 200 | 200 | 200 | 200 | 44.1 | 500 | 500 | 50.0 | 50.0 |
| | Hong Kong | 233 | 241 | 248 | 217 | 61 | 40.6 | 512 | 488 | 51.2 | 48.8 |
| | Korea | 200 | 200 | 200 | 200 | 200 | 44.7 | 500 | 500 | 50.0 | 50.0 |
| | Taiwan | 236 | 237 | 241 | 232 | 54 | 40.6 | 500 | 500 | 50.0 | 50.0 |
| Southeast Asia | Indonesia | 229 | 246 | 243 | 221 | 61 | 40.5 | 503 | 497 | 50.3 | 49.7 |
| | Malaysia | 254 | 244 | 235 | 226 | 41 | 39.8 | 491 | 509 | 49.1 | 50.9 |
| | Philippines | 228 | 228 | 229 | 219 | 96 | 41.3 | 500 | 500 | 50.0 | 50.0 |
| | Singapore | 200 | 219 | 218 | 206 | 157 | 43.5 | 527 | 473 | 52.7 | 47.3 |
| | Thailand | 247 | 241 | 242 | 232 | 38 | 39.9 | 500 | 500 | 50.0 | 50.0 |
| | Vietnam | 217 | 218 | 217 | 197 | 151 | 42.1 | 500 | 500 | 50.0 | 50.0 |
| South Asia | India | 200 | 200 | 200 | 204 | 196 | 44.0 | 500 | 500 | 50.0 | 50.0 |
| Oceania | Australia | 210 | 209 | 209 | 205 | 167 | 43.5 | 510 | 490 | 51.0 | 49.0 |
| | New Zealand | 205 | 211 | 216 | 200 | 168 | 43.8 | 499 | 501 | 49.9 | 50.1 |

## ▶ Attributes of respondents (Summary)

| | Average age (years) | Married (%) | Have a child/ children (%) | Graduate from university or higher (%) | Regular employee (%) | Full-time workers (%) | Managerial position (%) | Average annual income (USD) * | Predominant industry | Predominant type of work | No. of employees ≥1000 (%) | Working for domestic companies(%) | Average years in business of the company (years) | Average years of service (years) | Average times of career change (time) | Two or more career changes (%) |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Japan | 44.4 | 55.1 | 46.4 | 55.1 | 47.3 | 94.3 | 26.1 | 42,527 | Manufacturing | Specialist, engineering | 30.1 | 94.1 | 28.7 | 10.6 | 2.9 | 47.9 |
| China | 44.1 | 82.2 | 79.3 | 73.8 | 57.4 | 96.5 | 62.3 | 30,905 | Manufacturing | Indirect | 21.6 | 90.6 | 21.5 | 13.8 | 2.1 | 45.1 |
| Hong Kong | 40.6 | 60.6 | 49.0 | 60.2 | 73.2 | 97.7 | 40.3 | 55,252 | Wholesale and retail | Clerical work | 30.8 | 66.5 | 25.0 | 8.4 | 3.1 | 72.6 |
| Korea | 44.7 | 67.0 | 63.1 | 77.6 | 59.0 | 95.1 | 43.1 | 54,262 | Manufacturing | Clerical work | 16.2 | 91.6 | 19.9 | 8.2 | 2.5 | 53.7 |
| Taiwan | 40.6 | 60.2 | 55.1 | 71.8 | 71.2 | 97.3 | 39.7 | 29,732 | Manufacturing | Indirect | 21.1 | 87.6 | 22.5 | 9.1 | 3.0 | 67.3 |
| Indonesia | 40.5 | 82.1 | 78.8 | 72.4 | 58.2 | 93.1 | 45.1 | 31,277 | Manufacturing | Indirect | 13.0 | 77.0 | 19.4 | 9.4 | 2.5 | 62.8 |
| Malaysia | 39.8 | 72.7 | 68.9 | 64.6 | 66.7 | 97.0 | 56.2 | 21,242 | Manufacturing | Indirect | 21.7 | 70.5 | 19.0 | 8.2 | 2.8 | 66.6 |
| Philippines | 41.3 | 62.7 | 72.6 | 81.4 | 61.3 | 98.7 | 44.7 | 13,855 | Service industry | Indirect | 28.1 | 61.1 | 17.7 | 7.5 | 2.8 | 68.8 |
| Singapore | 43.5 | 64.8 | 56.8 | 60.3 | 75.5 | 98.8 | 49.8 | 55,692 | Manufacturing | Indirect | 35.5 | 59.3 | 20.6 | 7.9 | 3.1 | 71.3 |
| Thailand | 39.9 | 63.7 | 60.1 | 75.7 | 57.4 | 95.8 | 43.0 | 18,422 | Manufacturing | Indirect | 18.0 | 81.8 | 20.9 | 8.6 | 2.6 | 59.9 |
| Vietnam | 42.1 | 81.2 | 79.8 | 74.8 | 52.7 | 97.2 | 58.1 | 14,457 | Manufacturing | Clerical work | 13.8 | 70.3 | 16.3 | 7.9 | 2.1 | 48.7 |
| India | 44.0 | 84.8 | 79.8 | 93.5 | 73.5 | 97.3 | 57.6 | 42,327 | Information and communications | Information process/ Communication technology | 40.9 | 73.0 | 16.1 | 8.1 | 2.4 | 59.4 |
| Australia | 43.5 | 57.7 | 62.7 | 56.9 | 64.4 | 96.4 | 38.7 | 66,480 | Service industry | Clerical work | 34.1 | 78.2 | 22.0 | 8.5 | 3.5 | 76.6 |
| New Zealand | 43.8 | 52.9 | 64.5 | 45.2 | 62.9 | 97.0 | 31.9 | 49,847 | Medical services and welfare | Specialist, engineering | 25.0 | 73.7 | 21.7 | 7.3 | 3.9 | 81.5 |

*Converted from the local currency at the rate on January 18, 2019, to US dollars.

## ▶ What industry do you work in? / Which is the most applicable job type that corresponds to your current job?

(%)

| | Agriculture and forestry | Fisheries | Mining and quarrying of stone and gravel | Construction | Manufacturing | Electricity, gas, heat supply and water | Information and communications | Transport and postal | Wholesale and retail | Finance and insurance | Real estate, goods rental and leasing | Research institutes, professional and technical services (legal related, accountant, measurement related, etc.) | Hotel business, Food services | Living-related and personal services and amusement services | Education and learning support | Medical services and welfare | Post office, cooperative association, etc. | Other services | National government services and local public services | Other |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Japan | 0.4 | 0.0 | 0.1 | 4.3 | 15.5 | 1.1 | 5.9 | 3.6 | 9.8 | 5.1 | 2.7 | 2.4 | 4.1 | 2.6 | 5.9 | 9.4 | 0.1 | 13.6 | 4.6 | 8.8 |
| China | 1.6 | 0.6 | 1.2 | 6.6 | 21.2 | 3.6 | 6.2 | 3.3 | 5.6 | 6.3 | 2.9 | 5.6 | 1.4 | 2.6 | 6.9 | 4.0 | 0.5 | 2.6 | 3.3 | 14.0 |
| Hong Kong | 0.2 | 0.4 | 0.1 | 7.5 | 9.3 | 1.6 | 8.6 | 5.7 | 10.0 | 8.3 | 2.0 | 2.6 | 2.9 | 1.7 | 9.8 | 7.1 | 0.3 | 4.9 | 3.5 | 13.5 |
| Korea | 0.1 | 0.0 | 0.1 | 5.9 | 13.6 | 1.5 | 7.2 | 1.1 | 8.5 | 4.1 | 3.1 | 3.8 | 4.3 | 1.8 | 12.0 | 8.6 | 0.3 | 9.9 | 3.9 | 10.2 |
| Taiwan | 0.6 | 0.0 | 0.0 | 4.6 | 16.0 | 0.8 | 10.5 | 2.3 | 9.4 | 5.3 | 1.2 | 4.6 | 3.9 | 3.5 | 7.7 | 4.4 | 0.3 | 8.4 | 6.4 | 10.1 |
| Indonesia | 2.6 | 0.9 | 4.6 | 8.4 | 15.8 | 1.7 | 4.3 | 2.2 | 8.5 | 6.1 | 1.5 | 1.4 | 3.6 | 0.2 | 6.7 | 3.8 | 0.4 | 7.2 | 2.9 | 17.2 |
| Malaysia | 2.4 | 0.6 | 0.7 | 8.6 | 9.8 | 1.6 | 7.3 | 3.0 | 6.7 | 7.8 | 1.2 | 3.0 | 5.0 | 1.3 | 8.5 | 4.0 | 0.5 | 8.5 | 2.9 | 16.6 |
| Philippines | 1.0 | 0.4 | 0.4 | 5.6 | 5.7 | 1.4 | 12.0 | 1.6 | 10.8 | 6.8 | 4.4 | 1.6 | 3.6 | 0.4 | 6.0 | 4.2 | 0.3 | 16.4 | 4.5 | 12.9 |
| Singapore | 0.1 | 0.0 | 0.3 | 5.9 | 15.7 | 0.9 | 6.1 | 5.1 | 8.5 | 8.5 | 1.0 | 3.6 | 3.3 | 0.9 | 10.1 | 4.5 | 0.3 | 9.3 | 4.3 | 11.6 |
| Thailand | 1.9 | 0.1 | 0.1 | 5.7 | 15.7 | 2.0 | 3.4 | 2.5 | 11.9 | 2.9 | 2.2 | 1.0 | 3.0 | 0.6 | 6.4 | 2.9 | 0.3 | 8.6 | 5.7 | 23.1 |
| Vietnam | 3.1 | 0.3 | 0.3 | 9.0 | 12.0 | 0.9 | 11.8 | 1.3 | 10.5 | 4.5 | 1.2 | 2.9 | 2.8 | 1.2 | 7.8 | 3.8 | 0.2 | 4.7 | 2.0 | 19.7 |
| India | 0.7 | 0.3 | 0.2 | 3.5 | 14.8 | 0.8 | 28.7 | 1.4 | 4.5 | 10.5 | 0.8 | 1.6 | 1.7 | 0.1 | 7.6 | 2.4 | 0.1 | 4.6 | 1.9 | 13.8 |
| Australia | 1.4 | 0.2 | 0.7 | 7.0 | 6.0 | 0.6 | 6.9 | 3.0 | 8.8 | 7.3 | 1.7 | 2.9 | 2.6 | 1.6 | 9.6 | 7.5 | 0.8 | 10.3 | 5.3 | 15.8 |
| New Zealand | 3.2 | 0.4 | 0.4 | 6.7 | 6.8 | 1.2 | 8.9 | 6.0 | 8.8 | 3.5 | 2.6 | 2.6 | 4.4 | 1.6 | 9.5 | 9.8 | 0.2 | 8.9 | 4.9 | 9.6 |

(%)

| | Indirect (human resources, admin, finance etc.) | Clerical work (office work, reception, secretary, etc) | Sales | Store sales (sales staff, cashier, etc) | Service work (customer service, beautician, cook, hospitality, etc.) | Production processing, production management, manufacturing (production process worker, etc.) | Delivery, logistics, transportation | Data processing, communication technology | Product development, research | Specialist, engineering (lawyer, construction engineering, medical, welfare etc) | Agriculture, forestry and fisheries | Other |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Japan | 17.3 | 16.6 | 7.3 | 6.0 | 9.8 | 5.5 | 2.6 | 5.5 | 3.0 | 19.0 | 0.1 | 7.3 |
| China | 27.5 | 13.5 | 3.1 | 3.1 | 2.9 | 9.5 | 2.9 | 10.9 | 5.0 | 19.3 | 0.9 | 1.4 |
| Hong Kong | 23.5 | 26.3 | 3.1 | 3.3 | 6.6 | 4.5 | 2.8 | 7.1 | 2.5 | 16.1 | 0.5 | 3.7 |
| Korea | 6.4 | 39.4 | 4.7 | 3.8 | 10.5 | 3.9 | 1.3 | 4.4 | 5.4 | 15.2 | 0.1 | 4.9 |
| Taiwan | 20.0 | 14.1 | 6.1 | 6.2 | 8.7 | 7.8 | 2.2 | 9.2 | 6.2 | 12.6 | 0.7 | 6.2 |
| Indonesia | 32.4 | 5.6 | 7.5 | 3.7 | 3.8 | 7.6 | 3.4 | 8.3 | 5.7 | 9.1 | 1.1 | 11.8 |
| Malaysia | 20.1 | 13.6 | 7.3 | 3.0 | 7.9 | 4.9 | 3.3 | 8.4 | 3.9 | 17.2 | 1.6 | 8.8 |
| Philippines | 17.9 | 10.3 | 11.4 | 4.0 | 8.2 | 5.9 | 1.5 | 11.8 | 2.4 | 12.6 | 1.0 | 13.0 |
| Singapore | 18.9 | 11.0 | 8.0 | 1.5 | 8.3 | 5.8 | 5.1 | 6.8 | 4.8 | 17.7 | 0.1 | 12.0 |
| Thailand | 16.8 | 11.7 | 7.6 | 5.3 | 9.3 | 13.0 | 4.3 | 9.0 | 2.2 | 7.4 | 0.9 | 10.7 |
| Vietnam | 16.3 | 21.8 | 15.6 | 4.3 | 2.8 | 5.8 | 1.4 | 4.1 | 3.5 | 19.5 | 1.4 | 3.5 |
| India | 17.6 | 7.0 | 6.0 | 1.7 | 5.9 | 14.3 | 2.7 | 23.8 | 5.6 | 7.9 | 0.8 | 6.7 |
| Australia | 12.8 | 16.9 | 4.9 | 4.8 | 9.8 | 7.1 | 3.6 | 8.5 | 2.0 | 14.2 | 0.7 | 14.7 |
| New Zealand | 9.1 | 9.8 | 6.0 | 4.5 | 12.7 | 7.3 | 5.4 | 7.3 | 2.6 | 14.9 | 2.2 | 18.2 |

> **Opinions from the Field**
>
> For each survey item, opinions have been gathered from PERSOL Group APAC employees (from PERSOL Group APAC regional headquarters in China, Hong Kong, Korea, Taiwan, and Malaysia) and provided as commentary on local episodes and case studies and the assumptions underpinning these survey results.

## Survey Results |

# Working Conditions & Workplace Environment

Under what conditions, and in
what workplace environments, are people working?

In order to summarize the actual situation of organizations and working people in APAC, this survey has been divided into three sections: Working Conditions & Workplace Environment, Growth Through Work, and Employment Awareness & Intention to Change Jobs.

The first section, Working Conditions & Workplace Environment, investigates and analyzes the number of working days per week and working hours per day, the organizational culture of work, trends in management styles of superiors, and satisfaction with work in each country/region. For each item, certain characteristics have emerged for areas, countries and regions.

Here is some specific data.

09 **Working hours**
In most cases, the working week is at least 5 days
Working for 8-9 hours per day is the norm.

10 **Organizational culture**
What are the characteristics of organizational culture?
In East Asia, there is an emphasis on harmony and a strong tendency to follow instructions from superiors and avoid making waves.
In Southeast Asia, South Asia and Oceania, the emphasis is on teamwork.

12 **Superior's management behavior**
What are the characteristics of management behavior by superiors?
In East Asia, there is a tendency to praise, admonish and show appreciation.
In Oceania and Singapore, superiors seek to build trust.

14 **Satisfaction with work**
The majority indicates 70% or higher satisfaction with their work
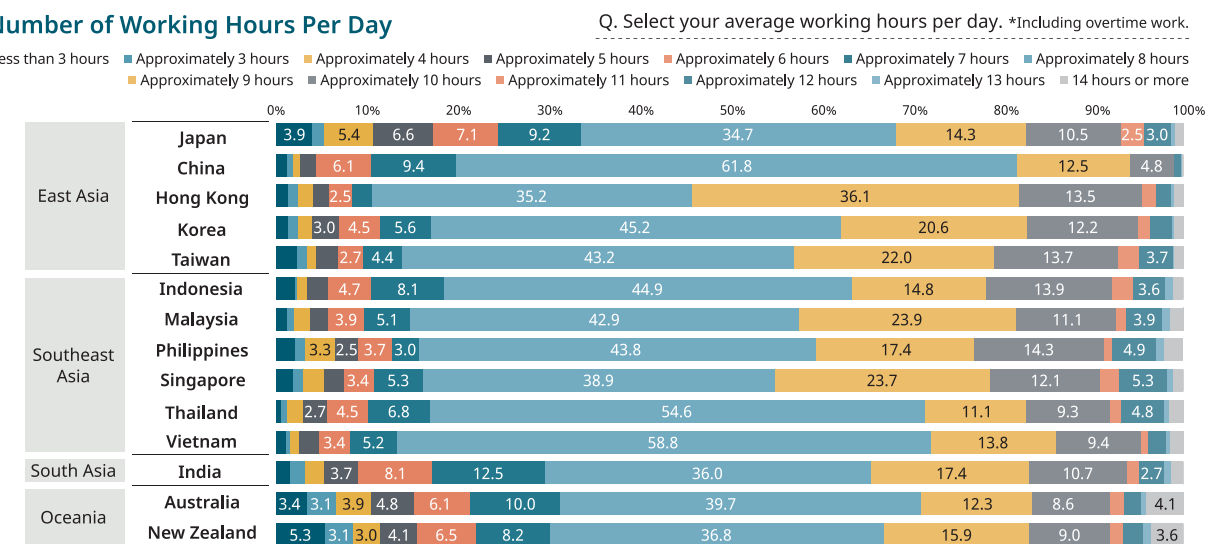India is the country with the highest level of satisfaction, while Japan has the lowest.

# In most cases, the working week is at least 5 days

Working for 8-9 hours per day is the norm.

▶ **Number of Working Days Per Week**

Q. Select your average working days per week.
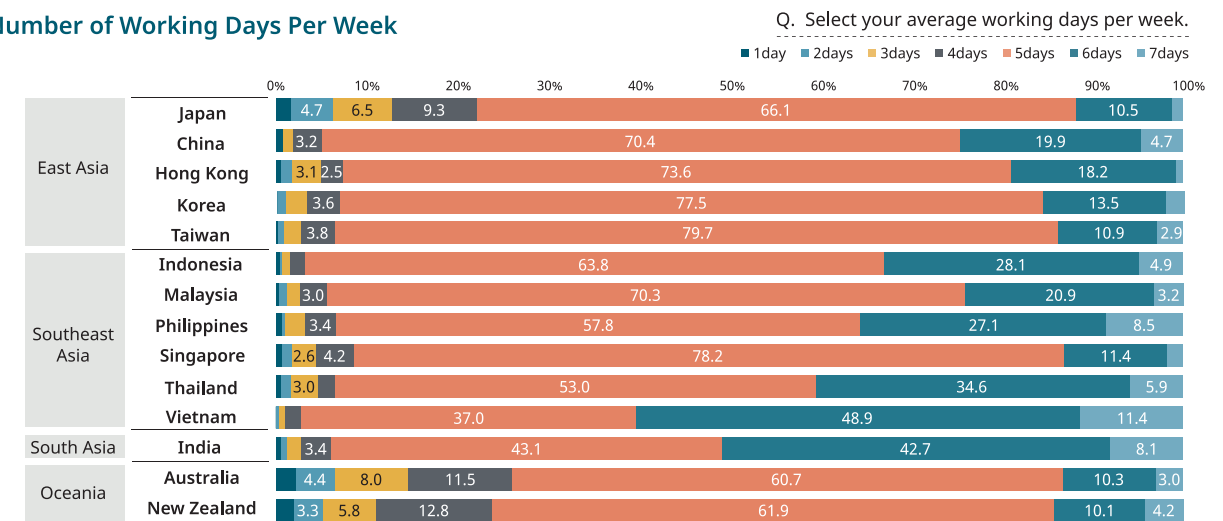


▶ **Number of Working Hours Per Day**

Q. Select your average working hours per day. *Including overtime work.



**8 countries/regions indicate a weekly average of 45 hours or higher**
**6 countries/regions indicate a weekly average under 45 hours**

In most cases, the number of working days was at least 5 days a week, with "about 8 working hours per day" being most common. There were many countries/regions with an average of around 45 hours a week, including overtime. The countries with less than 40 hours were Japan, Australia and New Zealand; the fact that the results for these three countries were so close is thought to be due to the ratio of respondents working part-time being close to 20%.

▶ **Weekly working hours**
* Calculating weekly working hours by multiplying working hours per day by the number of working days per week.
(Unit: hours)

| Country | Overall | | Male | | Female | |
|---|---|---|---|---|---|---|
| | Working Hours | Number of Respondents | Working Hours | Number of Respondents | Working Hours | Number of Respondents |
| Japan | 39.0 | (1,000) | 44.2 | (500) | 33.8 | (500) |
| China | 43.7 | (1,000) | 43.3 | (500) | 44.1 | (500) |
| Hong Kong | 45.3 | (1,000) | 46.6 | (512) | 43.9 | (488) |
| Korea | 44.4 | (1,000) | 45.6 | (500) | 43.2 | (500) |
| Taiwan | 45.1 | (1,000) | 46.3 | (500) | 43.9 | (500) |
| Indonesia | 46.3 | (1,000) | 46.7 | (503) | 45.8 | (497) |
| Malaysia | 45.9 | (1,000) | 46.2 | (491) | 45.5 | (509) |
| Philippines | 46.3 | (1,000) | 47.6 | (500) | 44.9 | (500) |
| Singapore | 44.7 | (1,000) | 46.2 | (527) | 43.0 | (473) |
| Thailand | 45.6 | (1,000) | 46.1 | (500) | 45.1 | (500) |
| Vietnam | 47.2 | (1,000) | 47.5 | (500) | 47.0 | (500) |
| India | 45.0 | (1,000) | 46.2 | (500) | 43.9 | (500) |
| Australia | 39.3 | (1,000) | 42.9 | (510) | 35.6 | (490) |
| New Zealand | 39.9 | (1,000) | 43.6 | (499) | 36.3 | (501) |

# What are the characteristics of organizational culture?

In East Asia, there is an emphasis on harmony and a strong tendency to follow instructions from superiors and avoid making waves.
In Southeast Asia, South Asia and Oceania, the emphasis is on teamwork.

## ▶ Organizational Culture    TOP 10 Rankings in Each Country/Region

Q. To what degree do the following items apply to your workplace? Please select the most applicable option for item. (Six-point scale / 24 options)

*The scores are the total value of "Completely applicable","Mostly applicable", and "Slightly applicable" .
*Items are colored using the same colors as those used for the Top 3 items for the average of all 14 countries/regions. ■ No. 1  ■ No. 2  ■ No. 3

| Rank | Japan (East Asia) | China | Hong Kong | Korea | Taiwan | Indonesia | Malaysia | Philippines (Southeast Asia) | Singapore | Thailand | Vietnam | India (South Asia) | Australia (Oceania) | New Zealand |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 1st | The general atmosphere is to just go along with whatever upper management decides — 80.2% | More value is placed on those who focus on maintaining harmony rather than those who willfully or selfishly push ahead with work — 96.0% | More importance is placed on final results than work processes — 90.2% | The most important thing in the company is to not make waves — 94.1% | More value is placed on those who focus on maintaining harmony rather than those who willfully or selfishly push ahead with work — 90.1% | Employees work as a team — 96.5% | Employees work as a team — 91.5% | Employees work as a team — 96.2% | Employees work as a team — 85.1% | The most important thing in the company is to not make waves — 95.2% | There is an atmosphere which promotes working together as a team to achieve goals — 97.1% | There is an atmosphere which promotes working together as a team to achieve goals — 95.7% | Employees work as a team — 86.2% | Employees work as a team — 87.2% |
| 2nd | More value is placed on those who focus on maintaining harmony rather than those who willfully or selfishly push ahead with work — 75.8% | Employees work as a team — 93.8% | The general atmosphere is to just go along with whatever upper management decides — 90.0% | The general atmosphere is to just go along with whatever upper management decides — 90.4% | More importance is placed on final results than work processes — 89.2% | More value is placed on those who focus on maintaining harmony rather than those who willfully or selfishly push ahead with work — 95.8% | There is an atmosphere which promotes working together as a team to achieve goals — 90.4% | There is an atmosphere which promotes working together as a team to achieve goals — 95.4% | The general atmosphere is to just go along with whatever upper management decides — 83.3% | Workers are expected to have unique and creative opinions and ways of thinking — 92.7% | We can say what we want even to superiors — 96.2% | Employees work as a team — 95.4% | There is an atmosphere which promotes working together as a team to achieve goals — 84.8% | There is an atmosphere which promotes working together as a team to achieve goals — 82.4% |
| 3rd | The most important thing in the company is to not make waves — 71.5% | The general atmosphere is to just go along with whatever upper management decides — 88.2% | The most important thing in the company is to not make waves — 88.3% | More value is placed on those who focus on maintaining harmony rather than those who willfully or selfishly push ahead with work — 88.3% | Employees work as a team — 86.2% | Workers are expected to have unique and creative opinions and ways of thinking — 95.4% | Workers are expected to have unique and creative opinions and ways of thinking — 88.6% | It is recommended that workers be able to think flexibly without being overly constrained by past practices or conventional rules — 93.3% | There is an atmosphere which promotes working together as a team to achieve goals — 81.9% | Employees work as a team — 92.5% | Employees work as a team — 95.6% | There is a focus on pursuing long term results over immediate results — 94.5% | There is an active exchange of opinions in the workplace and it is very lively — 79.6% | There are good relationships and no discrimination between superiors and subordinates — 78.6% |
| 4th | More importance is placed on final results than work processes — 71.0% | Workers are assessed based on competing and winning against coworkers — 92.5% | More value is placed on those who focus on maintaining harmony rather than those who willfully or selfishly push ahead with work — 86.7% | More importance is placed on final results than work processes — 83.4% | There is an atmosphere which promotes working together as a team to achieve goals — 85.4% | There is an atmosphere which promotes working together as a team to achieve goals — 95.4% | It is recommended that workers be able to think flexibly without being constrained by past practices or conventional rules — 88.4% | Workers are expected to have unique and creative opinions and ways of thinking — 93.2% | More importance is placed on final results than work processes — 81.8% | There is an atmosphere which promotes working together as a team to achieve goals — 91.6% | There is always an active exchange of opinions in the workplace and it is very lively — 94.6% | There is always an active exchange of opinions in the workplace and it is very lively — 94.2% | There are good relationships and no discrimination between superiors and subordinates — 78.5% | There is always an active exchange of opinions in the workplace and it is very lively — 76.6% |
| 5th | More importance is placed on timing and speed than on spending time deliberating — 69.5% | There is an atmosphere which promotes working together as a team to achieve goals — 92.5% | Employees work as a team — 84.5% | There is an atmosphere which promotes working together as a team to achieve goals — 81.8% | The most important thing in the company is to not make waves — 83.7% | The most important thing in the company is to not make waves — 94.5% | We are encouraged to not be too focused on only immediate tasks, but to also consider long-term points of view — 88.0% | We are encouraged to not be too focused on only immediate tasks, but to also consider long-term points of view — 93.0% | It is recommended that workers be able to think flexibly without being overly constrained by past practices or conventional rules — 79.0% | There is a focus on pursuing long term results over immediate results — 91.3% | More value is placed on those who focus on maintaining harmony rather than those who willfully or selfishly push ahead with work — 94.6% | Workers are expected to have unique and creative opinions and ways of thinking — 92.9% | We are encouraged to not be too focused on only immediate tasks, but to also consider long-term points of view — 76.3% | It is recommended that workers be able to think flexibly without being overly constrained by past practices or conventional rules — 76.4% |
| 6th | Effort is not rewarded if it does not achieve results — 68.0% | An equal amount of importance is placed on social responsibility and profit — 92.2% | There is a focus on pursuing long term results over immediate results — 82.6% | Effort is not rewarded if it does not achieve results — 79.8% | Workers are expected to have unique and creative opinions and ways of thinking — 83.2% | Even if slightly rough, quick decision-making is valued — 94.5% | More value is placed on those who focus on maintaining harmony rather than those who willfully or selfishly push ahead with work — 87.4% | There is always an active exchange of opinions in the workplace and it is very lively — 92.3% | More importance is placed on timing and speed than on spending time deliberating — 78.9% | We are encouraged to not be too focused on only immediate tasks, but to also consider long-term points of view — 90.9% | Workers are expected to have unique and creative opinions and ways of thinking — 94.5% | An equal amount of importance is placed on social responsibility and profit — 92.0% | It is recommended that workers be able to think flexibly without being overly constrained by past practices or conventional rules — 75.3% | There is a focus on pursuing long term results over immediate results — 75.3% |
| 7th | An equal amount of importance is placed on social responsibility and profit — 67.7% | It is recommended that workers be able to think flexibly without being overly constrained by past practices or conventional rules — 91.7% | More importance is placed on timing and speed than on spending time deliberating — 82.6% | More importance is placed on timing and speed than on spending time deliberating — 75.8% | There is a focus on pursuing long term results over immediate results — 83.0% | We are encouraged to not be too focused on only immediate tasks, but to also consider long-term points of view — 94.5% | An equal amount of importance is placed on social responsibility and profit — 86.7% | There is a focus on pursuing long term results over immediate results — 92.2% | We are encouraged to not be too focused on only immediate tasks, but to also consider long-term points of view — 78.2% | There are good relationships between superiors and subordinates — 90.3% | The most important thing in the company is to not make waves — 93.5% | It is recommended that workers be able to think flexibly without being overly constrained by past practices or conventional rules — 91.6% | We are encouraged to not be too focused on only immediate tasks, but to also consider long-term points of view — 75.3% | We are encouraged to not be too focused on only immediate tasks, but to also consider long-term points of view — 74.8% |
| 8th | There are good relationships and no discrimination between superiors and subordinates — 67.6% | Even if slightly rough, quick decision-making is valued — 91.7% | Even if slightly rough, quick decision-making is valued — 80.5% | An equal amount of importance is placed on social responsibility and profit — 75.6% | Things are not decided through open discussion but through behind-the-scenes discussions held in advance — 82.6% | We are encouraged to not be too focused on only immediate tasks, but to also consider long-term points of view — 94.3% | There is a focus on pursuing long term results over immediate results — 86.6% | There are good relationships and no discrimination between superiors and subordinates — 91.3% | There is a focus on pursuing long term results over immediate results — 77.5% | An equal amount of importance is placed on social responsibility and profit — 90.0% | It is recommended that workers be able to think flexibly without being overly constrained by past practices or conventional rules — 93.5% | More importance is placed on timing and speed than on spending time deliberating — 91.4% | There is a focus on pursuing long term results over immediate results — 74.3% | Workers are expected to have unique and creative opinions and ways of thinking — 71.5% |
| 9th | It is assumed employees will be employed until retirement age — 65.0% | There is a focus on pursuing long term results over immediate results — 90.7% | It is recommended to act and then consider while proceeding — 80.4% | Employees work as a team — 74.7% | More importance is placed on timing and speed than on spending time deliberating — 82.3% | It is encouraged to clearly state one's own opinions without trying to conform to others — 94.1% | There is always an active exchange of opinions in the workplace and it is very lively — 86.2% | An equal amount of importance is placed on social responsibility and profit — 90.6% | Even if slightly rough, quick decision-making is valued — 76.4% | Even if slightly rough, quick decision-making is valued — 89.7% | We are encouraged to not be too focused on only immediate tasks, but to also consider long-term points of view — 93.2% | There are good relationships and no discrimination between superiors and subordinates — 91.2% | It is encouraged to clearly state one's own opinions without trying to conform to others — 73.4% | It is encouraged to clearly state one's own opinions without trying to conform to others — 70.7% |
| 10th | Pay and working conditions are based on age and length of employment — 62.2% | Workers are expected to have unique and creative opinions and ways of thinking — 90.7% | There is an atmosphere which promotes working together as a team to achieve goals — 80.2% / Effort is not rewarded if it does not achieve results — 80.2% | Pay and working conditions are based on age and length of employment — 73.6% | There is always an active exchange of opinions in the workplace and it is very lively — 82.2% | An equal amount of importance is placed on social responsibility and profit — 93.8% | The general atmosphere is to just go along with whatever upper management decides — 86.1% | More value is placed on those who focus on maintaining harmony rather than those who willfully or selfishly push ahead with work — 89.6% | There is always an active exchange of opinions in the workplace and it is very lively — 75.7% / There are good relationships and no discrimination between superiors and subordinates — 75.7% | The workplace focuses more on developing generalists than specialists in specific fields — 88.6% | An equal amount of importance is placed on social responsibility and profit — 92.1% | An equal amount of importance is placed on social responsibility and profit — 92.1% | More value is placed on those who focus on maintaining harmony rather than those who willfully or selfishly push ahead with work — 90.6% | Even if slightly rough, quick decision-making is valued — 72.8% | The general atmosphere is to just go along with whatever upper management decides — 70.4% / More importance is placed on final results than work processes — 70.4% |

## Characteristics of East Asia:
## An organizational culture that emphasizes harmony, following instructions from superiors and avoiding making waves

When we asked workers across the 14 countries/regions about their workplace, the three top-ranking responses were: "Employees work as a team," "There is an atmosphere which promotes working together as a team to achieve goals," and "More value is placed on those who focus on maintaining harmony rather than those who willfully or selfishly push ahead with work." Looking at each area, in East Asia, there was a greater tendency to respect organizational order, with top-ranking responses including "More value is placed on those who focus on maintaining harmony rather than those who willfully or selfishly push ahead with work," "The general atmosphere is to just go along with whatever upper management decides," and "The most important thing in the company is to not make waves." Of all the countries/regions, this tendency was particularly strong in Japan and Korea.

Moreover, in Japan, the response "It is assumed that employees will be employed until retirement age" ranked 9th, providing evidence of an organizational culture not seen anywhere else.

## China also looks toward individual evaluation

In China, "Workers are assessed based on competing and winning against coworkers" was ranked 4th. This item, which emphasized individual evaluation, was ranked only in China, and it offers a glimpse of an organizational culture with an emphasis on competitive evaluation. In Taiwan, "There is always an active exchange of opinions in the workplace and the atmosphere is very lively" ranked 10th, while "Things are not decided through open discussion but through behind-the-scenes discussions held in advance" ranked 8th. Although daily communication in the workplace is active and open, the organizational culture seems to require behind-the-scenes negotiations prior to decision-making.

## Outside of East Asia, team & group unity ranked high
## In Southeast Asia, originality and creativity were desirable

In Southeast Asia, South Asia and Oceania, "Employees work as a team" and "There is an atmosphere which promotes working together as a team to achieve goals" both ranked high.

Also, in Indonesia, Malaysia, the Philippines and Thailand, "Workers are expected to have unique and creative opinions and ways of thinking" ranked high, while "It is recommended that workers be able to think flexibly without being overly constrained by past practices or conventional rules" ranked high in Malaysia, the Philippines and Singapore. It seems that in Southeast Asia, there is a strong tendency to seek flexible ideas and ingenuity utilizing each worker's unique qualities.

### Opinions from the Field

- Differences between East Asia, Southeast Asia and South Asia that were brought out in the survey results can be seen in the way business is conducted in these countries. Moreover, the fact that the results for Singapore tended to resemble those of East Asia is convincing, considering that a majority of the residents have a Chinese background.
- In Southeast Asia, South Asia and Oceania, "Employees work as a team" and "There is an atmosphere which promotes working together as a team to achieve goals" both ranked high, but the significance of this is believed to be slightly different between Asia and Oceania. In Southeast Asia, this refers to social unity based on the spirit of mutual assistance and a sense of being a large family, while in Oceania this signifies so-called teamwork through individualism, closer to the Western ideal.

- In Southeast Asia, amid its background of strong economic growth, a succession of innovative businesses have emerged through industries rising to meet challenges without being constrained by existing customs or common wisdom (as can be seen in the introduction and development of advanced IT technology, for instance). It can be said that these characteristics are reflected in the organizational culture.
- In Korea, even if company rules or procedures are somewhat inefficient, it tends to be more important to maintain the organizational atmosphere. Men in particular may be more used to top-down culture due to their experience of military service.
- In Taiwan, the wishes of the company president or CEO (lǎo bǎn) are often a driving force for the company, and thus making prior negotiations is important.

# What are the characteristics of management behavior by superiors?

In East Asia, there is a tendency to praise, admonish and show appreciation.
In Oceania and Singapore, superiors seek to build trust.

▶ Superiors' Management Behavior   TOP 10 Rankings in Each Country/Region

Q. Select the most applicable option for each item regarding your relationship with your current superior. (Five-point scale / 15 options)

*The scores are the total value of "Very applicable" and "Slightly applicable".
*Items are colored using the same colors as those used for the Top 3 items for the average of all 14 countries/regions. ■ No. 1  ■ No. 2 and No. 3

| | East Asia | | | | | | | Southeast Asia | | | | South Asia | Oceania | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Japan | China | Hong Kong | Korea | Taiwan | Indonesia | Malaysia | Philippines | Singapore | Thailand | Vietnam | India | Australia | New Zealand |
| **1st** | Superiors interact with me in a manner equal to how they interact with other workplace members 42.1% | I am satisfied with how my superior cautions and admonishes me 86.7% | I am satisfied with how my superior cautions and admonishes me 73.6% | Superiors praise me for my good work 74.8% | Superiors take my opinions into account for work 74.0% | Superiors provide definite objectives for the entire workplace 85.3% | Superiors assign me with roles of responsibility 83.7% | Superiors assign me with roles of responsibility 90.9% | Superiors assign me with roles of responsibility 77.1% | Superiors assign me with roles of responsibility 90.7% | Superiors praise me when I do good work 87.2% | Superiors provide vision and direction 90.6% | Superiors assign me with roles of responsibility 77.2% | I am able to ask supervisors for advice on work related problems and dissatisfaction 78.2% |
| **2nd** | There is sufficient follow-up from superiors when a mistake occurs 39.4% | Superiors praise me when I do good work 86.7% | Superiors provide support for work to progress smoothly 70.9% | Superiors take my opinions into account for work 63.9% | Superiors provide definite objectives for the entire workplace 69.9% | Superiors assign me work which allows me to learn skills and increase my capabilities 84.6% | Superiors provide vision and direction 80.3% | Superiors provide support for work to progress smoothly 89.1% | I am able to ask supervisors for advice on work related problems and dissatisfaction 71.4% | I am satisfied with how my superior cautions and admonishes me 90.1% | Superiors assign me work which allows me to learn skills and increase my capabilities 87.1% | Superiors provide support for work to progress smoothly 90.3% | I am able to ask supervisors for advice on work related problems and dissatisfaction 76.5% | Superiors assign me with roles of responsibility 77.6% |
| **3rd** | Superiors assign me with roles of responsibility 39.1% | Superiors assess me in a manner consistent with my job performance 84.1% | Superiors praise me when I do good work 67.9% | Superiors assign me with roles of responsibility 63.6% | Superiors provide support for work to progress smoothly 68.2% | Superiors take my opinions into account for work 84.2% | Superiors provide definite objectives for the entire workplace 80.1% | Superiors assign me work which allows me to learn skills and increase my capabilities 88.4% | Superiors assess me in a manner consistent with my job performance 69.8% | Superiors provide support for work to progress smoothly 87.6% | Superiors provide support for work to progress smoothly 85.9% | Superiors assign me work which allows me to learn skills and increase my capabilities 90.1% | I am able to set personal work objectives together with superiors 73.3% | Superiors interact with me in a manner equal to how they interact with other workplace members 75.5% |
| 4th | Superiors praise me when I do good work 38.2% | Superiors provide definite objectives for the entire workplace 83.3% | Superiors assess me in a manner consistent with my job performance 67.6% | Superiors provide support for work to progress smoothly 63.6% | Superiors assess me in a manner consistent with my job performance 67.0% | Superiors assign me with roles of responsibility 82.9% | Superiors provide support for work to progress smoothly 79.9% | Superiors provide vision and direction 88.2% | Superiors take my opinions into account for work 69.5% | Superiors provide definite objectives for the entire workplace 85.1% | Superiors provide definite objectives for the entire workplace 85.8% | Superiors assign me with roles of responsibility 90.0% | Superiors assess me in a manner equal to how they interact with other workplace members 73.1% | Superiors praise me when I do good work 75.4% |
| 5th | Superiors take my opinions into account for work 37.4% | Superiors provide vision and direction 83.3% | Superiors take my opinions into account for work 65.7% | Superiors provide definite objectives for the entire workplace 63.5% | I am satisfied with how my superior cautions and admonishes me 66.2% | Superiors provide vision and direction 82.8% | Superiors assess me in a manner consistent with my job performance 79.6% | Superiors provide definite objectives for the entire workplace 88.1% | Superiors provide support for work to progress smoothly 68.9% | Superiors assess me in a manner consistent with my job performance 85.0% | Superiors take my opinions into account for work 84.7% | Superiors assess me in a manner consistent with my job performance 89.3% | Superiors assess me in a manner consistent with my job performance 72.9% | Superiors assess me in a manner consistent with my job performance 72.4% |
| 6th | Superiors provide support for work to progress smoothly 35.2% | Superiors assign me with roles of responsibility 82.9% | My superiors verbally show me thanks and appreciation on a daily basis 65.5% | Superiors assess me in a manner consistent with my job performance 62.1% | Superiors provide support for work to progress smoothly 65.4% | There is sufficient follow-up from superiors when a mistake occurs 82.3% | Superiors assign me work which allows me to learn skills and increase my capabilities 78.9% | Superiors interact with me in a manner equal to how they interact with other workplace members 87.5% | Superiors interact with me in a manner equal to how they interact with other workplace members 68.3% | I am able to set personal work objectives together with superiors 84.9% | Superiors assess me in a manner consistent with my job performance 84.6% | Superiors praise me when I do good work 89.2% | Superiors provide definite objectives for the entire workplace 72.7% | Superiors take my opinions into account for work 71.5% |
| 7th | My superiors verbally show me thanks and appreciation on a daily basis 34.7% | Superiors interact with me in a manner equal to how they interact with other workplace members 82.8% | There is sufficient follow-up from superiors when a mistake occurs 64.0% | Superiors interact with me in a manner equal to how they interact with other workplace members 59.0% | Superiors provide vision and direction 65.3% | Superiors assess me in a manner consistent with my job performance 81.2% | Superiors interact with me in a manner equal to how they interact with other workplace members 78.4% | Superiors assess me in a manner consistent with my job performance 87.2% | Superiors assign me work which allows me to learn skills and increase my capabilities 67.6% | Superiors assign me work which allows me to learn skills and increase my capabilities 84.9% | Superiors interact with me in a manner equal to how they interact with other workplace members 83.4% | Superiors provide definite objectives for the entire workplace 89.0% | Superiors take my opinions into account for work 72.6% | Superiors provide support for work to progress smoothly 71.1% |
| 8th | Superiors provide definite objectives for the entire workplace 34.5% | Superiors provide support for work to progress smoothly 81.0% | Superiors provide vision and direction 63.3% | Superiors assign me work which allows me to learn skills and increase my capabilities 62.8% | Superiors assign me work which allows me to learn skills and increase my capabilities 62.8% | Superiors provide support for work to progress smoothly 81.2% | I am able to set personal work objectives together with superiors 76.8% | I am able to ask supervisors for advice on work related problems and dissatisfaction 87.0% | Superiors provide definite objectives for the entire workplace 66.3% | There is sufficient follow-up from superiors when a mistake occurs 83.2% | I am able to set personal work objectives together with superiors 82.4% | I am able to ask supervisors for advice on work related problems and dissatisfaction 89.0% | Superiors provide support for work to progress smoothly 72.4% | Superiors provide vision and direction 70.5% |
| 9th | Superiors assign me work which allows me to learn skills and increase my capabilities 32.3% | Superiors take my opinions into account for work 80.3% | Superiors assign me work which allows me to learn skills and increase my capabilities 62.7% | My superiors verbally show me thanks and appreciation on a daily basis 58.1% | Superiors assign me with roles of responsibility 62.4% | I am able to ask supervisors for advice on work related problems and dissatisfaction 80.9% | I am satisfied with how my superior cautions and admonishes me 76.5% | There is sufficient follow-up from superiors when a mistake occurs 86.5% | There is sufficient follow-up from superiors when a mistake occursa 65.8% | Superiors praise me when I do good work 83.2% | Superiors provide vision and direction 81.8% | Superiors interact with me in a manner equal to how they interact with other workplace members 88.4% | Superiors praise me when I do good work 70.8% | Superiors provide definite objectives for the entire workplace 70.4% |
| 10th | Superiors assess me in a manner consistent with my job performance 32.0% | Superiors assign me work which allows me to learn skills and increase my capabilities 79.8% | Superiors interact with me in a manner equal to how they interact with other workplace members 61.5% | I am satisfied with how my superior cautions and admonishes me 56.5% | My superiors verbally show me thanks and appreciation on a daily basis 62.1% | Superiors interact with me in a manner equal to how they interact with other workplace members 80.6% | Superiors praise me when I do good work 76.3% | Superiors take my opinions into account for work 86.0% | Superiors provide vision and direction 65.2% | Superiors assign me with roles of responsibility 80.8% | Superiors interact with me in a manner equal to how they interact with other workplace members 82.8% | There is sufficient follow-up from superiors when a mistake occurs 87.9% | Superiors provide vision and direction 70.3% | I am able to set personal work objectives together with superiors 70.4% |

## Management behavior that is common everywhere includes entrusting work to workers and appropriate evaluation

How is the management behavior of superiors viewed by their subordinates?

Looking at the rankings across all 14 countries/regions, "Superiors assign me with roles of responsibility," "Superiors praise me when I do good work" and "Superiors provide support for work to progress smoothly" were the three top-ranking responses. Giving appealing work, appropriately supporting work duties and properly evaluating good work (three points that can be described as essential skills for superiors in bringing out the performance of their subordinates) ranked at the top.

## Southeast Asia shows an emphasis on "management of work duties"
## East Asia also shows consideration for emotions

Looking at trends by region, in Southeast Asia and South Asia,

"Superiors assign me work which allows me to learn skills and increase my capabilities" ranked in the top 10, while "Superiors provide vision and direction" ranked high in many countries/regions. In areas with highly dynamic employment conditions, there is probably the risk that human resources will drain away if employers cannot continue to offer appealing work accompanied by vision.

On the other hand, East Asia is characterized by high rankings for "Superiors praise me when I do good work," "I am satisfied with how my superior cautions and admonishes me," and "My superiors verbally show me thanks and appreciation on a daily basis." Due to the strong tendency to respect "face" in East Asian culture, a lot of management behavior takes into account emotional aspects such as ways to praise and admonish and taking care to appreciate workers.

In Oceania and Singapore, "I am able to ask supervisors for advice on work related problems and dissatisfaction" ranked in the top two. This can be interpreted as indicating that superiors help their subordinates develop while building relationships of trust.

### ╲ Opinions from the Field ╱

• Compared to Japan, where there is a strong focus on "not causing problems," other parts of Asia can be described as having a stronger awareness of "using the organization to advance work projects." Given this, workers want superiors to clearly express their vision and their expectations for work duties, but Japanese bosses are prone to decision-making delays and ambiguity in giving instructions, and workers sometimes complain about this.

• In Southeast Asia, it is common to increase skills and salary by changing jobs, so if the company and its management are not committed to considering the personal growth of individuals, outstanding employees will immediately change jobs, seeking a more attractive employer. Assigning work that leads to the improvement of individual skills and abilities is also a strategy for retaining outstanding employees.

• In Japan, equality is so strongly emphasized that it is positioned at the top, but overseas, fairness is more desirable. The mainstream approach in Asia is to assign subordinates responsibilities and roles, then evaluate the results carefully and appropriately. The idea that good work will be rewarded and bad work punished is widely accepted.

• Many leading Korean companies have adopted various "praise campaigns" to create a culture of praise in the workplace. When subordinates deliver results, their superiors actively praise them, which improves their motivation.

• In Taiwan, there is a strong willingness to flexibly adopt new approaches, which stems from Taiwan's background of striking a balance between China and the USA, and it is common to see management behavior in which managers incorporate opinions from their subordinates.
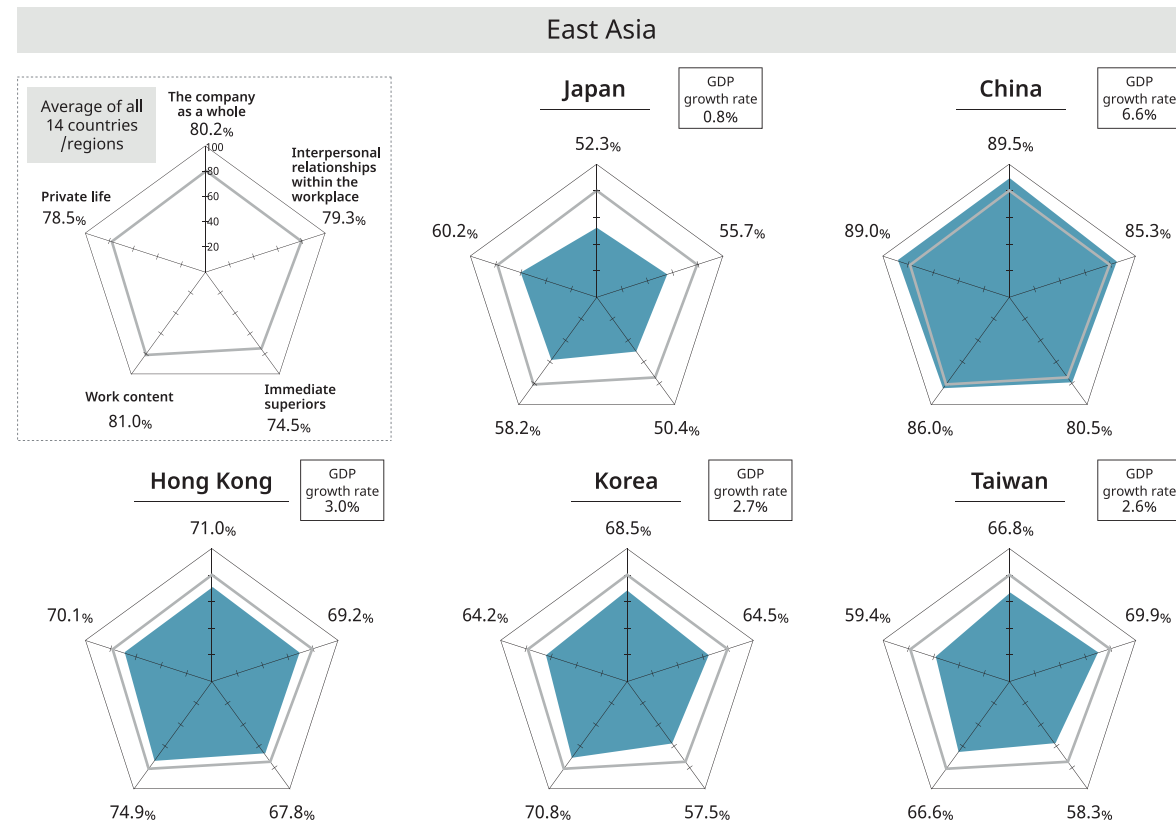
# The majority indicates 70% or higher satisfaction with their work

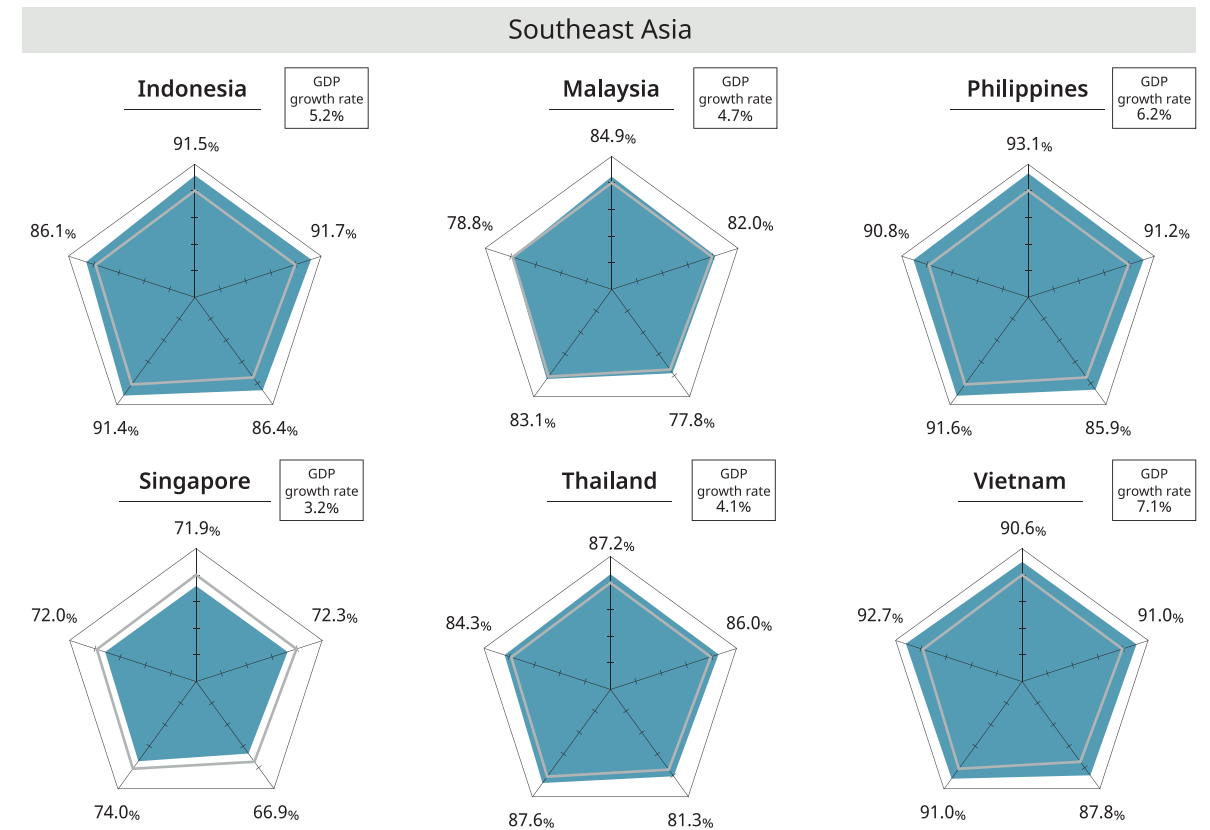India is the country with the highest level of satisfaction, while Japan has the lowest.

▶ Work Satisfaction

Q. Select the most applicable option regarding your degree of satisfaction with each item. (Seven-point scale)

*The scores show the total value of "Very satisfied", "Satisfied", and "Somewhat satisfied".
*Gray line: average of all 14 countries/regions. Blue pentagon: average for that country/region.

## East Asia

**Average of all 14 countries/regions**
The company as a whole 80.2%
Interpersonal relationships within the workplace 79.3%
Immediate superiors 74.5%
Work content 81.0%
Private life 78.5%

**Japan** — GDP growth rate 0.8%
52.3% / 55.7% / 50.4% / 58.2% / 60.2%

**China** — GDP growth rate 6.6%
89.5% / 85.3% / 80.5% / 86.0% / 89.0%

**Hong Kong** — GDP growth rate 3.0%
71.0% / 69.2% / 67.8% / 74.9% / 70.1%

**Korea** — GDP growth rate 2.7%
68.5% / 64.5% / 57.5% / 70.8% / 64.2%

**Taiwan** — GDP growth rate 2.6%
66.8% / 69.9% / 58.3% / 66.6% / 59.4%

*GDP growth rates are 2018 figures from IMF DataMapper (Real GDP growth & Annual percent change)

## Southeast Asia

**Indonesia** — GDP growth rate 5.2%
91.5% / 91.7% / 86.4% / 91.4% / 86.1%

**Malaysia** — GDP growth rate 4.7%
84.9% / 82.0% / 77.8% / 83.1% / 78.8%

**Philippines** — GDP growth rate 6.2%
93.1% / 91.2% / 85.9% / 91.6% / 90.8%

**Singapore** — GDP growth rate 3.2%
71.9% / 72.3% / 66.9% / 74.0% / 72.0%

**Thailand** — GDP growth rate 4.1%
87.2% / 86.0% / 81.3% / 87.6% / 84.3%

**Vietnam** — GDP growth rate 7.1%
90.6% / 91.0% / 87.8% / 91.0% / 92.7%

## South Asia

**India** — GDP growth rate 7.1%
93.7% / 91.3% / 91.7% / 93.5% / 90.5%

## Oceania

**Australia** — GDP growth rate 2.8%
81.7% / 80.4% / 75.9% / 83.3% / 79.3%

**New Zealand** — GDP growth rate 3.0%
80.4% / 80.0% / 75.2% / 82.4% / 81.0%

### East Asia tended to fall below average

In response to questions about satisfaction with "The company as a whole," "Interpersonal relationships within the workplace," "Immediate superiors," "Work content," and "Private life," the average score across the 14 countries/regions was at least 70% for each item, while 80.2% were satisfied with "The company as a whole" and 81.0% were satisfied with "Work content." The various radar charts show these averages compared with the results for each country/region. Looking at trends, the Philippines, Indonesia, Vietnam, and India all ranked above average for the 5 items, followed by China, Thailand and Malaysia. Of all the responses, India was the most satisfied, with all figures exceeding 90%. On the other hand, in East Asia aside from China and Singapore, all 5 items ranked below the average for the 14 countries/regions, while satisfaction with "Immediate superiors" ranked the lowest among the 5 factors. In Australia and New Zealand, levels of satisfaction were around average.

### ╲ Opinions from the Field ╱

· Countries/regions with more emerging growth potential had basically higher scores, showing a discrepancy with developed countries/regions, where a sense of "feeling stuck" was evident. In emerging economies, there appeared to be a positive cycle in which the more you do, the more your organization grows, the more its profits increase, and the more your quality of life improves. On the other hand, in some ASEAN countries/regions, there is little sense of the value of trying one's best and there is an evident tendency to keep things merely at an acceptable level.
· In Korea, the military concept of "shooter & secondary shooter" (the secondary shooter helps the shooter to shoot, and the shooter passes on expertise to the secondary shooter) is common, and this way of thinking has some effect on "Immediate superiors."
· In Taiwan, there is less satisfaction with "Private life" and "Immediate superiors." However, excessive overtime has recently become a social problem and the law has been revised to introduce a system of two non-working days each week. In addition, the wishes of the company president or CEO (lǎo bǎn) are often a strong driving force in Taiwanese companies, which makes the lack of middle management ability a problem for some companies.
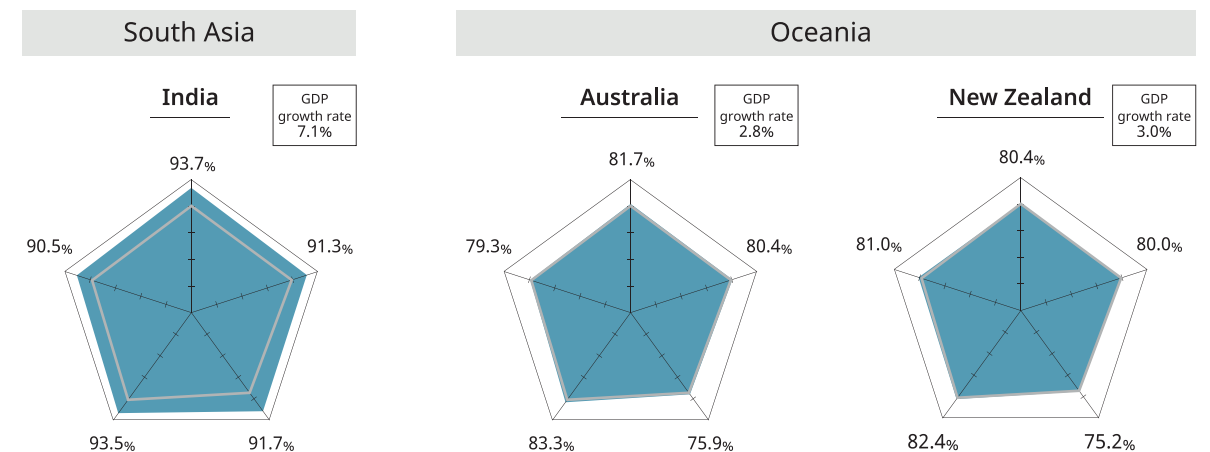
## Survey Results Ⅱ

# Growth Through Work

### What do people think about growth through work?

This part presents a summary of trends in growth through work.

For example, with regard to the effect of "growth through work," some workers responded with "Position/rank goes up" and "Pay/salary increases," while others responded with "Attaining new knowledge and experience. "The data on "Thinking regarding personal work" and "Images" has been posted.

We also investigated the actual situation of self-learning and personal development activities with questions such as "How important do you feel growth through work is?" and "Do you feel you have achieved growth? "Desire for growth was commonly observed, but when it came to actual feelings and specific actions, some differences were evident. Here is some actual data.

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17    **Desire for growth & feeling of actual growth**

### 90% of people seek personal growth through work
The biggest gaps between desire for growth and feeling of actual growth were seen in Japan, Korea, and Singapore.

18    **Effects of growth**

### What gives you feelings of growth?
Effects of growth include "Improved compensation" and "Improved skills."

20    **External learning and self-development**

### What are you doing for your own growth?
In Southeast Asia and India, desire for self-study is evident.

---

## 90% of people seek personal growth through work
The biggest gaps between desire for growth and feeling of actual growth were seen in Japan, Korea, and Singapore.

▶ **Percentage of respondents who think that "growth through working" is important (high degree of desire for growth) (%)/ Percentage of respondents who feel that they are achieving growth (high degree of awareness of growth) (%)**

Q. How important do you feel "growth through work" is? (Seven-point scale)
Q. Looking back over the past 1 year, do you feel you have achieved growth through your work? (Seven-point scale)

*The scores show the total value of "Very important", "Important", and "Slightly important"/ *The scores show the total value of "I strongly feel so", "I feel so", and "I slightly feel so".

| countries/regions | | Degree of desire for growth(%) | Degree of awareness of growth(%) | Desire–Awareness GAP(pt) |
|---|---|---|---|---|
| 1st | Indonesia | 99.9 | 94.4 | -5.5 |
| 2nd | Philippines | 99.9 | 92.8 | -7.1 |
| 3rd | India | 99.6 | 95.5 | -4.1 |
| 4th | Vietnam | 98.7 | 96.7 | -2.0 |
| 5th | Thailand | 98.4 | 89.8 | -8.6 |
| 6th | Malaysia | 97.6 | 86.1 | -11.5 |
| 7th | Korea | 96.3 | 76.7 | -19.6 |
| 8th | China | 95.9 | 89.8 | -6.1 |
| 9th | Taiwan | 95.4 | 82.2 | -13.2 |
| 10th | Singapore | 95.2 | 77.8 | -17.4 |
| 11th | Australia | 93.6 | 78.7 | -14.9 |
| 12th | Hong Kong | 93.0 | 81.7 | -11.3 |
| 13th | New Zealand | 92.5 | 77.4 | -15.1 |
| 14th | Japan | 85.5 | 60.2 | -25.3 |

### Desire for growth & feeling of actual growth were both high in Indonesia, the Philippines, India and Vietnam

What do people think about achieving growth through work? in which growth through work is regarded as important, accounts for more than 85% across all 14 countries/regions. Among all these countries/regions, almost all respondents in Indonesia, the Philippines and India indicate that they valued this. Moreover, "feeling of actual growth," which indicates whether or not workers felt that growth was achieved through their work over the past year, was rated at 70% or higher in all countries/regions aside from Japan.

### Desire for growth > Feeling of actual growth

Compared with desire for growth, the feeling of actual growth was lower overall, but in the 6 countries (Indonesia, the Philippines, India, Vietnam, Thailand, and China) where this gap was less than 10%, the figures for feelings of actual growth were all around 90%, so feelings of growth are clearly being experienced. The largest gap was seen in Japan at 25.3 points. This was followed by Korea at 19.6 points and Singapore at 17.4 points. Japan in particular had the lowest desire for growth and feeling of actual growth among all 14 countries/regions. One feature of Japanese-style employment is that employment is "guaranteed" until retirement age, so there is rarely any concern about losing one's job even if growth is not achieved; however, in the case of job-by-job employment, workers are unable to advance their career or change jobs unless they achieve a certain level of growth.

### Opinions from the Field

- In emerging countries showing remarkable growth, visible changes such as more subway lines opening and new buildings being constructed can serve to accelerate a sense of growth. When a company is growing visibly, the changes in its situation are evident, so workers may have a strong sense of growth. In developed countries, on the other hand, work tends to be fragmented or divided, and daily duties tend to be repetitive, so achieving a sense of growth through work can be more difficult.
- In Korea, a new management trend is increasingly evident, in which employers encourage employees to use the company as a platform to build up their own careers and promote their own growth, which also helps the company grow.
- In Hong Kong, rather than striving hard wherever they are assigned, workers tend to prefer transferring to environments where they can shine the brightest. Since the barriers to changing jobs are low, this can create relatively high feelings of actual growth.

# What gives you feelings of growth?

Effects of growth include "Improved compensation" and "Improved skills."

▶ **Effects of Growth of Working People　TOP 10 Rankings in Each Country/Region**

Q. Select the three most applicable items that are close to the image of "growth through working" in your mind.

*The top 3 out of the total 31 items are selected. Weighted scores (Multiplying the first score by 3, second by 2, third by 1, and summing up for the item)
*Items are colored using the same colors as those used for the Top 3 items for the average of all 14 countries/regions. ■ No. 1　■ No. 2　■ No. 3

### East Asia / Southeast Asia / South Asia / Oceania

| Rank | Japan | China | Hong Kong | Korea | Taiwan | Indonesia | Malaysia | Philippines | Singapore | Thailand | Vietnam | India | Australia | New Zealand |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 1st | Pay/salary increases 670.0pt | Pay/salary increases 631.0pt | Pay/salary increases 786.0pt | Pay/salary increases 617.0pt | Pay/salary increases 888.0pt | Pay/salary increases 523.0pt | Pay/salary increases 594.0pt | Pay/salary increases 762.0pt | Pay/salary increases 701.0pt | Pay/salary increases 715.0pt | Pay/salary increases 418.0pt | Pay/salary increases 478.0pt | Pay/salary increases 574.0pt | Attaining new knowledge and experience 673.0pt |
| 2nd | Becoming able to carry out work based on my own decisions 376.0pt | Becoming able to perform more specialized work 341.0pt | Becoming able to deal with problems 454.0pt | Becoming able to perform more specialized work 609.0pt | Becoming able to deal with problems 458.0pt | Acquiring skills and abilities which are universally applicable 442.0pt | Attaining new knowledge and experience 503.0pt | Attaining new knowledge and experience 489.0pt | Attaining new knowledge and experience 538.0pt | Improving work efficiency and speed 380.0pt | Acquiring skills and abilities which are universally applicable 342.0pt | Improving work efficiency and speed 326.0pt | Attaining new knowledge and experience 557.0pt | Pay/salary increases 672.0pt |
| 3rd | Becoming able to perform more specialized work 366.0pt | Becoming able to carry out work from a wider perspective 328.0pt | Attaining new knowledge and experience 415.0pt | Becoming able to carry out work from a wider perspective 495.0pt | Attaining new knowledge and experience 442.0pt | Improving work efficiency and speed 406.0pt | Acquiring skills and abilities which are universally applicable 328.0pt | Acquiring skills and abilities which are universally applicable 446.0pt | Acquiring skills and abilities which are universally applicable 336.0pt | Position/rank goes up 360.0pt | Becoming able to perform more specialized work 316.0pt | Contributing to overall organization achievements 290.0pt | Acquiring skills and abilities which are universally applicable 394.0pt | Acquiring skills and abilities which are universally applicable 372.0pt |
| 4th | Acquiring skills and abilities which are universally applicable 355.0pt | Improving work efficiency and speed 320.0pt | Improving work efficiency and speed 325.0pt | Becoming able to deal with problems 362.0pt | Acquiring skills and abilities which are universally applicable 324.0pt | Attaining new knowledge and experience 395.0pt | Improving work efficiency and speed 315.0pt | Contributing to overall organization achievements 377.0pt | Improving work efficiency and speed 311.0pt | Attaining new knowledge and experience 333.0pt | Improving work efficiency and speed 316.0pt | Acquiring skills and abilities which are universally applicable 264.0pt | Becoming able to perform a wider range of work 261.0pt | Improving work efficiency and speed 290.0pt |
| 5th | Attaining new knowledge and experience 345.0pt | Position/rank goes up 295.0pt | Position/rank goes up 311.0pt | Attaining new knowledge and experience 359.0pt | Position/rank goes up 261.0pt | Becoming able to effectively cooperate with coworkers and other departments 304.0pt | Becoming able to deal with problems 301.0pt | Position/rank goes up 341.0pt | Position/rank goes up 292.0pt | Becoming able to deal with problems 306.0pt | Becoming able to carry out work from a wider perspective 282.0pt | Attaining new knowledge and experience 260.0pt | Improving work efficiency and speed 257.0pt | Contributing to overall organization achievements 270.0pt |
| 6th | Improving work efficiency and speed 337.0pt | Becoming able to deal with problems 292.0pt | Becoming more resilient to stress 263.0pt | Position/rank goes up 321.0pt | Becoming more resilient to stress 245.0pt | Becoming able to deal with problems 260.0pt | Position/rank goes up 266.0pt | Improving work efficiency and speed 297.0pt | Becoming able to deal with problems 279.0pt | Becoming able to carry out work from a wider perspective 258.0pt | Attaining new knowledge and experience 281.0pt | Position/rank goes up 253.0pt | Contributing to overall organization achievements 253.0pt | Position/rank goes up 221.0pt |
| 7th | Becoming able to perform a wider range of work 292.0pt | Attaining new knowledge and experience 279.0pt | Becoming able to carry out work from a wider perspective 217.0pt | Becoming able to carry out work based on my own decisions 254.0pt | Becoming able to clearly define the career I want to pursue 240.0pt | Position/rank goes up 257.0pt | Becoming able to carry out work from a wider perspective 262.0pt | Becoming able to clearly define the career I want to pursue 224.0pt | Contributing to overall organization achievements 220.0pt | Acquiring skills and abilities which are universally applicable 256.0pt | Becoming more resilient to stress 266.0pt | Developing work manners 238.0pt | Position/rank goes up 221.0pt | Becoming able to perform more specialized work 204.0pt |
| 8th | Becoming able to deal with problems 292.0pt | Acquiring skills and abilities which are universally applicable 257.0pt | Becoming able to clearly define the career I want to pursue 217.0pt | Becoming able to perform a wider range of work 251.0pt | Improving work efficiency and speed 227.0pt | Becoming able to carry out work from a wider perspective 247.0pt | Becoming able to perform a wider range of work 227.0pt | Becoming able to perform a wider range of work 201.0pt | Becoming able to perform a wider range of work 207.0pt | Persevering to follow through on work until it is completed 243.0pt | Position/rank goes up 247.0pt | Becoming able to perform more specialized work 219.0pt | Feeling positive about taking on new work 219.0pt | Becoming able to perform a wider range of work 202.0pt |
| 9th | Reducing mistakes and misjudgments 208.0pt | Contributing to overall organization achievements 206.0pt | Reducing mistakes and misjudgments 189.0pt | Improving work efficiency and speed 206.0pt | Becoming able to carry out work from a wider perspective 208.0pt | Contributing to overall organization achievements 224.0pt | Becoming able to perform more specialized work 203.0pt | Becoming able to carry out work from a wider perspective 200.0pt | Becoming able to perform more specialized work 204.0pt | Becoming able to carry out work based on my own decisions 226.0pt | Increasing connections inside and outside the company 238.0pt | Increasing connections inside and outside the company 213.0pt | Becoming able to deal with problems 214.0pt | Becoming able to carry out work based on my own decisions 198.0pt |
| 10th | Position/rank goes up 193.0pt | Increasing connections inside and outside the company 200.0pt | Becoming better able to control my feelings 176.0pt | Becoming able to clearly define the career I want to pursue 198.0pt | Becoming better able to control my feelings 157.0pt | Becoming able to clearly define the career I want to pursue 219.0pt | Becoming able to prepare to become independent 203.0pt | Being able to develop good friendships in the workplace 195.0pt | Becoming able to prepare to become independent 190.0pt | Becoming able to effectively cooperate with coworkers and other departments 220.0pt | Becoming able to clearly define the career I want to pursue 202.0pt | Feeling positive about taking on new work 211.0pt | Becoming able to carry out work based on my own decisions 188.0pt | Feeling positive about taking on new work 190.0pt |

## Realizing that skills have improved led to feelings of growth

When do workers feel they have achieved actual growth?

We asked workers to select the top 3 items they believed "most applicable to themselves" from all 31 items related to "growth through work," after which we carried out a weighted tabulation. The most important point was "Pay/salary increases. "This was followed by items such as "Attaining new knowledge and experience" and "Acquiring skills and abilities which are universally applicable," which ranked high in many countries/regions. Overall, the effect of "Growth = Improved skills" was quite common. It can be seen that not only acquisition of basic skills, but also acquisition of applied abilities (such as broader work duties and skills applicable elsewhere) led to feelings of actual growth.

## A clear vision for one's career offers another image of growth

Aside from better compensation and improved skills, another top-ranking effect for "growth through work" was "Becoming able to clearly define the career I want to pursue," which ranked high in Hong Kong, Korea, Taiwan, Indonesia, the Philippines and Vietnam. It is assumed that having a clear vision for one's career makes it easier to focus on goals and take steps toward growth.

### Opinions from the Field

• In Southeast Asia, workers have a strong desire for approval, tending to almost equal the desire for a higher salary. In other words, salary serves as an objective measure of one's own growth, and there is a strong tendency to measure by market value. The idea that "high salary = results of self-growth" is widely accepted.
• Korean businesspeople tend to have a powerful belief that strengthening their own specialized expertise will lead to growth and development. For this reason, they tend to select careers that allows them to acquire specialized expertise. Also, for the purpose of changing jobs, many businesspeople are making efforts toward individual learning regardless of current employment; this might include obtaining qualifications and scores from taking various certification courses or language exams. On the other hand, some businesspeople also express their concerns about the increasing number of new employees who overemphasize their own specialized expertise, rendering them in capable of taking on unrelated duties.

• In Taiwan, a lot of attention is paid to salary increases, and many individuals believe that gaining experience and knowledge will lead to growth and self-fulfillment. Moreover, given the importance of "face" in the Taiwanese cultural background, the ability to operate independently and "Becoming able to deal with problems" are also considered valuable.
• In Hong Kong, there is a strong tendency toward becoming specialist oriented in terms of career development. This is supported by the fact that "Becoming able to deal with problems," "Attaining new knowledge and experience" and "Improving work efficiency and speed" ranked at the top. Both at our own company and client companies, local Hong Kong staff can be seen continually attending classes after they finish work. At cafés on non-working days too, there is nearly always at least one private language lesson underway.

# What are you doing for your **own growth**?

In Southeast Asia and India, desire for self-study is evident.

## ▶ Self-learning and Personal Development Activities Outside Place of Employment

Q. What self-learning and personal development activities do you participate in outside of your place of employment for your own growth?

(Multiple responses / 11 options)

*Items are colored using the same colors for the Top 3 items. ■ No.1 ■ No.2 ■ No.3

(%)

| | Reading | Participation in training courses, seminars, study sessions, etc. | Studying to acquire certifications | Language study | Distance learning, e-learning | Side jobs/ subsidiary businesses | Participation in NPOs, volunteering, and other social activities | University, graduate school, vocational school | Holding/ running study sessions, etc. | Other | I do nothing in particular |
|---|---|---|---|---|---|---|---|---|---|---|---|
| Average of 14 countries /regions | 42.3 | 36.9 | 26.5 | 24.5 | 23.1 | 19.6 | 17.9 | 15.2 | 13.1 | 2.9 | 13.3 |
| Japan | 27.4 | 13.6 | 13.6 | 10.2 | 7.7 | 7.6 | 4.4 | 4.6 | 2.7 | 4.5 | 46.3 |
| China | 32.3 | 33.4 | 35.9 | 23.1 | 32.7 | 13.9 | 16.6 | 13.6 | 22.4 | 1.1 | 6.3 |
| Hong Kong | 38.8 | 24.4 | 20.1 | 24.6 | 14.4 | 16.7 | 8.9 | 14.3 | 6.8 | 1.8 | 18.3 |
| Korea | 40.6 | 30.3 | 29.4 | 31.7 | 22.7 | 10.4 | 7.5 | 12.9 | 7.9 | 2.9 | 12.3 |
| Taiwan | 34.8 | 31.0 | 25.9 | 30.5 | 25.7 | 16.2 | 8.9 | 14.3 | 13.1 | 2.1 | 13.0 |
| Indonesia | 45.1 | 53.4 | 50.7 | 32.2 | 23.2 | 24.6 | 37.3 | 22.6 | 15.8 | 3.3 | 2.3 |
| Malaysia | 51.4 | 52.0 | 24.8 | 24.4 | 29.6 | 26.6 | 22.8 | 17.4 | 16.2 | 3.1 | 7.4 |
| Philippines | 51.5 | 55.1 | 30.0 | 20.1 | 29.7 | 32.0 | 25.5 | 20.6 | 12.3 | 3.6 | 6.4 |
| Singapore | 36.9 | 37.0 | 19.2 | 12.5 | 17.7 | 11.0 | 13.9 | 10.3 | 7.0 | 2.0 | 18.3 |
| Thailand | 44.0 | 43.6 | 31.9 | 42.2 | 31.4 | 41.5 | 24.0 | 19.2 | 17.2 | 2.0 | 5.7 |
| Vietnam | 53.7 | 44.2 | 25.3 | 46.3 | 26.9 | 21.6 | 23.8 | 15.2 | 25.1 | 1.6 | 2.0 |
| India | 40.9 | 45.8 | 31.3 | 23.4 | 29.0 | 23.9 | 27.6 | 22.5 | 22.3 | 2.2 | 4.9 |
| Australia | 45.7 | 27.4 | 16.7 | 12.0 | 16.3 | 15.0 | 14.2 | 14.4 | 7.4 | 4.4 | 21.5 |
| New Zealand | 48.4 | 25.7 | 15.8 | 9.1 | 16.4 | 13.1 | 15.2 | 10.9 | 6.5 | 6.5 | 22.1 |

### Self-development through "Reading" & "Participation in training courses, seminars, study sessions, etc." was common overall

Indonesia, Malaysia, the Philippines, Thailand, Vietnam and India showed the highest rates of voluntary learning and self-development activities for personal growth. Regarding specific content, high rankings for "Reading" and "Participation in training courses, seminars, study sessions, etc." were common, but in certain countries, such as Indonesia and China, emphasis was placed on "Studying to acquire certifications." It can be inferred that the greater the awareness that skill improvement leads to growth and creation of job opportunities, the stronger the tendency to engage in learning and self-development activities without hesitation to invest in oneself.

On the other hand, looking at the "I do nothing in particular" response, Japan stood out at 46.3%, while this response scored about 10–20% in Oceania, Hong Kong and Singapore.

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**FEATURED**

### Number of self-study efforts (*average count)

*Average count = number of selected options to upper-level questions

| | | | |
|---|---|---|---|
| Indonesia | 3.08 | Taiwan | 2.03 |
| Thailand | 2.97 | Korea | 1.96 |
| Vietnam | 2.84 | Australia | 1.74 |
| Philippines | 2.80 | Hong Kong | 1.71 |
| India | 2.69 | New Zealand | 1.68 |
| Malaysia | 2.68 | Singapore | 1.68 |
| China | 2.25 | Japan | 0.96 |

### ╲ Opinions from the Field ╱

- Asian businesspeople actively network with people on social media who are active in the fields they are interested in or who seem likely to be able to enhance their knowledge. For example, they actively approach such people via social media.
- In Korea, published results from a survey of 500 businesspeople have shown that at least 70% continue to take qualification tests or language classes after gaining employment.
- In Taiwan, people are enthusiastic about language learning; this is believed to be influenced by Taiwan's politically unstable environment, in which traveling and working abroad is quite common.

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## Survey Results Ⅲ

# Employment Awareness & Intention to Change Jobs

### What do people think about their work?

In this section, data related to employment awareness, intention to continue working and intention to change jobs was compiled.

The major topics handled here are how workers perceive the act of "working" itself and what sorts of tendencies exist for intentions to continue working at the same company. Specifically, we approached the actual situation of job changing through multifaceted questions such as continuous years of service, number of job changes, reasons for job changes, and effects of job change. In addition, we asked about "reasons for working" as a fundamental way to question and understand "why people work." Aspects both common and different across countries and regions became evident.

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**22** Thinking about work
### Ways of approaching work results and diversity
Strong desire for promotion in countries/regions undergoing remarkable development.

**24** Changing jobs & independence
### Work continuously? Change jobs? Become independent?
Workers stay in their current workplace to gain experience, but eventually change jobs at least twice on average.

**26** Reasons for changing jobs
### The two main reasons for changing jobs are "salary" and "growth"
Dissatisfaction with salary ranked high in many countries/regions. In Southeast Asia, changing jobs is seen as an opportunity to expand one's career.

**28** Effects of changing jobs
### Positive effects of changing jobs
What about income? Career? Market value?

**30** Reasons for working
### Why do you wish to continue working?
Maintaining the same levels of "income" and "health" is one common reason for working.

# Ways of approaching work results and diversity

Strong desire for promotion in countries/regions undergoing remarkable development.

▶ **Thinking Regarding Personal Work**

## （ⅰ）Promotion and evaluation

■ **I want to be promoted at my company**

| | |
|---|---|
| Thailand | 4.7 |
| Philippines | 4.6 |
| India | 4.5 |
| Vietnam | 4.5 |
| Malaysia | 4.3 |
| Indonesia | 4.3 |
| Singapore | 4.1 |
| China | 4.0 |
| Taiwan | 3.9 |
| Australia | 3.9 |
| Hong Kong | 3.8 |
| New Zealand | 3.7 |
| Korea | 3.7 |
| Japan | 2.9 |

■ **I want to be assessed based on the results of my work**

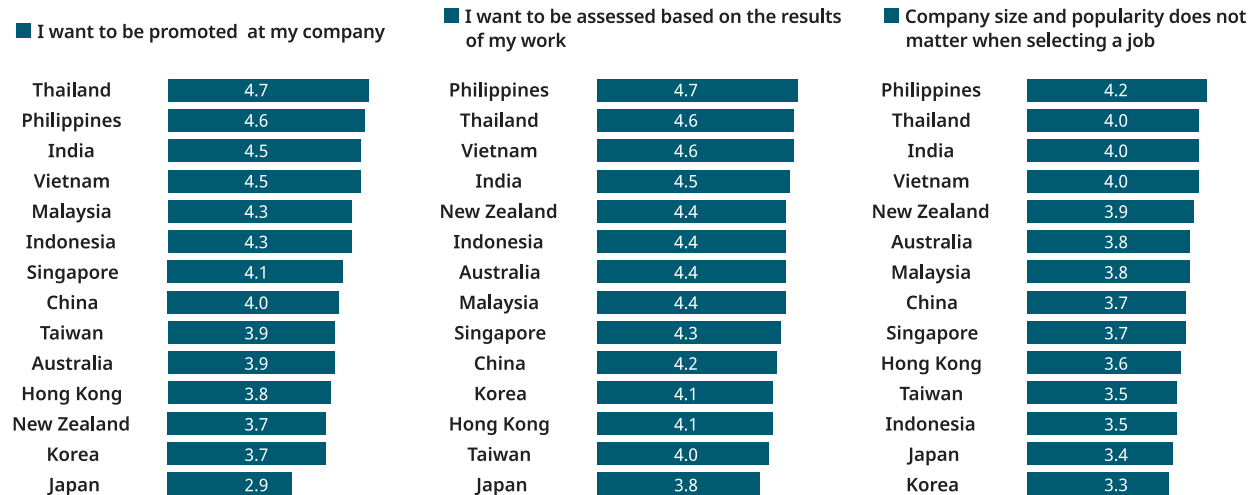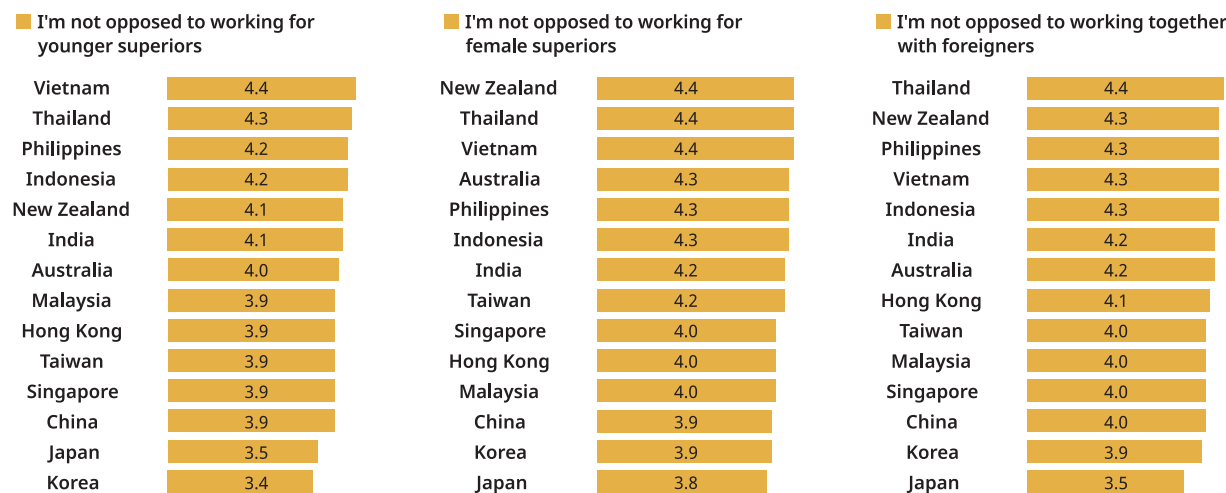| | |
|---|---|
| Philippines | 4.7 |
| Thailand | 4.6 |
| Vietnam | 4.6 |
| India | 4.5 |
| New Zealand | 4.4 |
| Indonesia | 4.4 |
| Australia | 4.4 |
| Malaysia | 4.4 |
| Singapore | 4.3 |
| China | 4.2 |
| Korea | 4.1 |
| Hong Kong | 4.1 |
| Taiwan | 4.0 |
| Japan | 3.8 |

■ **Company size and popularity does not matter when selecting a job**

| | |
|---|---|
| Philippines | 4.2 |
| Thailand | 4.0 |
| India | 4.0 |
| Vietnam | 4.0 |
| New Zealand | 3.9 |
| Australia | 3.8 |
| Malaysia | 3.8 |
| China | 3.7 |
| Singapore | 3.7 |
| Hong Kong | 3.6 |
| Taiwan | 3.5 |
| Indonesia | 3.5 |
| Japan | 3.4 |
| Korea | 3.3 |

## （ⅱ）Superiors and coworkers

■ **I'm not opposed to working for younger superiors**

| | |
|---|---|
| Vietnam | 4.4 |
| Thailand | 4.3 |
| Philippines | 4.2 |
| Indonesia | 4.2 |
| New Zealand | 4.1 |
| India | 4.1 |
| Australia | 4.0 |
| Malaysia | 3.9 |
| Hong Kong | 3.9 |
| Taiwan | 3.9 |
| Singapore | 3.9 |
| China | 3.9 |
| Japan | 3.5 |
| Korea | 3.4 |

■ **I'm not opposed to working for female superiors**

| | |
|---|---|
| New Zealand | 4.4 |
| Thailand | 4.4 |
| Vietnam | 4.4 |
| Australia | 4.3 |
| Philippines | 4.3 |
| Indonesia | 4.3 |
| India | 4.2 |
| Taiwan | 4.2 |
| Singapore | 4.0 |
| Hong Kong | 4.0 |
| Malaysia | 4.0 |
| China | 3.9 |
| Korea | 3.9 |
| Japan | 3.8 |

■ **I'm not opposed to working together with foreigners**

| | |
|---|---|
| Thailand | 4.4 |
| New Zealand | 4.3 |
| Philippines | 4.3 |
| Vietnam | 4.3 |
| Indonesia | 4.3 |
| India | 4.2 |
| Australia | 4.2 |
| Hong Kong | 4.1 |
| Taiwan | 4.0 |
| Malaysia | 4.0 |
| Singapore | 4.0 |
| China | 4.0 |
| Korea | 3.9 |
| Japan | 3.5 |

Q. Select the most applicable option for each item regarding your thoughts on attitudes towards work. (Five-point scale)

*The scores are average values on the five-point scale.

## （ⅲ）Working style

■ **I want to work in an office with flexible office plan, or other places I choose rather than assigned seats**

| | |
|---|---|
| Thailand | 4.3 |
| Vietnam | 4.3 |
| India | 4.2 |
| Philippines | 4.1 |
| Indonesia | 3.9 |
| Malaysia | 3.9 |
| China | 3.9 |
| Hong Kong | 3.8 |
| Korea | 3.7 |
| Singapore | 3.5 |
| Taiwan | 3.5 |
| Australia | 3.2 |
| New Zealand | 3.2 |
| Japan | 3.1 |

■ **I want to work when I choose rather than at set times every day**

| | |
|---|---|
| India | 4.2 |
| Thailand | 4.1 |
| Vietnam | 4.1 |
| Philippines | 4.0 |
| China | 4.0 |
| Hong Kong | 3.9 |
| Singapore | 3.8 |
| Malaysia | 3.8 |
| Australia | 3.8 |
| New Zealand | 3.7 |
| Korea | 3.7 |
| Indonesia | 3.7 |
| Taiwan | 3.6 |
| Japan | 3.3 |

### Opinions from the Field

· The strong desire for promotion in Southeast Asia and individualism in India are very obvious to see. Southeast Asia is one of the fastest-growing regions in the world, so people who work there are also naturally very aware of growth. On the other hand, in India, the IT industry has evolved remarkably, backed by excellent education in mathematics. This has further boosted India's strong tendency toward individualism.
· ASEAN countries have gradually advancing economic community systems, a tradition of many women working, and a rising number of young people seeking education overseas, so flexible attitudes toward diversity are high.
· Korean society has a strong awareness of seniority, and workers there are more likely to resist the notion of younger superiors.
· In Taiwan, people like traditional working styles and prefer to have their own assigned desks.

## Strong desire for promotion in Thailand, the Philippines, Vietnam, India
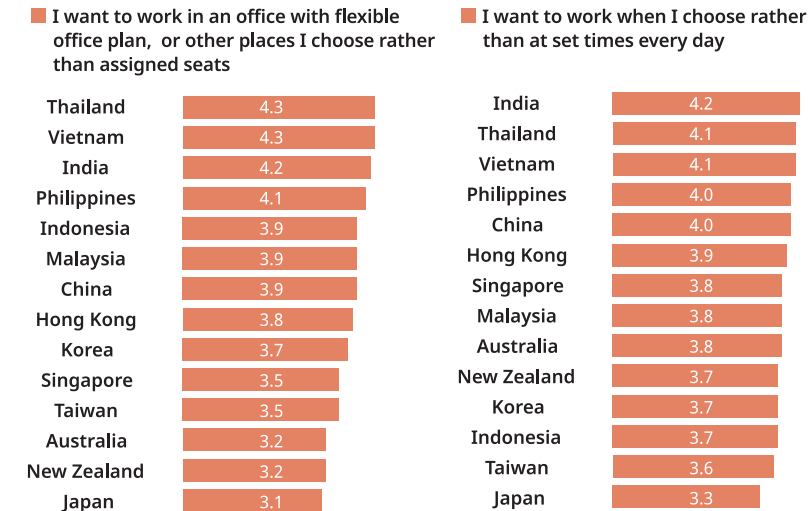
These graphs are the result of questions we asked about ways of thinking about work and workplace environments, with workers responding whether or not the listed options were close to their own opinions.

In India and Southeast Asia (particularly in Thailand, the Philippines, and Vietnam, where these responses were top-ranking), there was a strong tendency to emphasize "I want to be promoted at my company" and "I want to be assessed based on the results of my work,"

which shows the strong desire for promotion in countries/regions undergoing marked development. East Asia and Oceania showed lower desire for promotion than in Southeast Asia, with desire for promotion the lowest in Japan of all 14 countries/regions.

Also, in comparison to East Asia, a higher percentage of people in Southeast Asia and Oceania believed that "Company size and popularity does not matter when selecting a job." Compared to East Asian cultures, which tend to focus on "face" (prestige) and making comparisons with competitors, Southeast Asia and Oceania showed more desire to gain experience and improve one's own assessment regardless of company size or name recognition.

## High acceptance of diversity in Southeast Asia, India and Oceania

Looking at the tendencies to accept diversity – such as willingness to work for superiors who are younger or female (still in the minority) or to work together with foreigners – Vietnam, Thailand, the Philippines and New Zealand were all positioned among the high rankings for these 3 categories. In countries where people of diverse races, religions and values reside, there seems to be a high degree of acceptance for diversity in the workplace too. On the other hand, Korea and Japan generally ranked quite low in these categories. This is probably because they are male-centered societies with seniority systems.

## Strong tendencies to demand flexible work styles in Southeast Asia and India

In regard to the workplace, Thailand, Vietnam, India and the Philippines showed the highest desire for "I want to work in an office with flexible office plan, or other places I choose rather than assigned seats."

Demand for freedom in choosing working hours was high in India, Thailand, Vietnam, the Philippines and China. In Southeast Asia and India, chronic traffic congestion is now a major social problem, which probably makes people more likely to express desire for flexible work styles.

# Work continuously? Change jobs? Become independent?

Workers stay in their current workplace to gain experience, but eventually change jobs at least twice on average.

Q. Select the most applicable option for each item regarding your future employment. (Five-point scale)
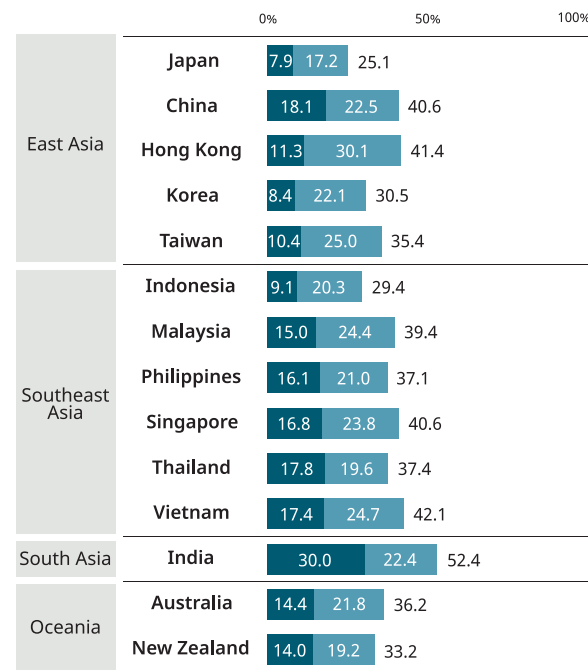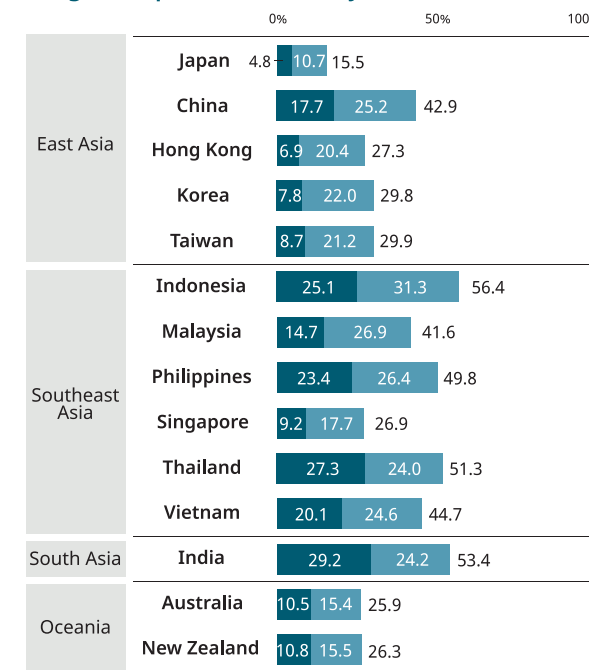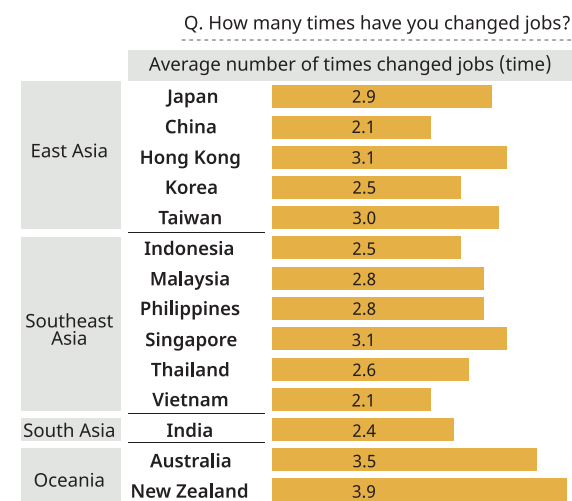
■ Completely agree  ■ Slightly agree  Total of Agree

## ▶ "I want to continue working at my current place of employment"

| | | Completely agree | Slightly agree | Total |
|---|---|---|---|---|
| East Asia | Japan | 19.1 | 33.3 | 52.4 |
| | China | 37.0 | 45.8 | 82.8 |
| | Hong Kong | 24.6 | 44.8 | 69.4 |
| | Korea | 21.5 | 46.2 | 67.7 |
| | Taiwan | 33.6 | 33.7 | 67.3 |
| Southeast Asia | Indonesia | 29.7 | 34.5 | 64.2 |
| | Malaysia | 36.2 | 37.5 | 73.7 |
| | Philippines | 48.7 | 31.2 | 79.9 |
| | Singapore | 28.9 | 38.6 | 67.5 |
| | Thailand | 45.8 | 28.5 | 74.3 |
| | Vietnam | 55.6 | 27.9 | 83.5 |
| South Asia | India | 58.1 | 27.9 | 86.0 |
| Oceania | Australia | 47.2 | 28.3 | 75.5 |
| | New Zealand | 43.3 | 29.8 | 73.1 |

## ▶ "I want to move to another job/company"

| | | Completely agree | Slightly agree | Total |
|---|---|---|---|---|
| East Asia | Japan | 7.9 | 17.2 | 25.1 |
| | China | 18.1 | 22.5 | 40.6 |
| | Hong Kong | 11.3 | 30.1 | 41.4 |
| | Korea | 8.4 | 22.1 | 30.5 |
| | Taiwan | 10.4 | 25.0 | 35.4 |
| Southeast Asia | Indonesia | 9.1 | 20.3 | 29.4 |
| | Malaysia | 15.0 | 24.4 | 39.4 |
| | Philippines | 16.1 | 21.0 | 37.1 |
| | Singapore | 16.8 | 23.8 | 40.6 |
| | Thailand | 17.8 | 19.6 | 37.4 |
| | Vietnam | 17.4 | 24.7 | 42.1 |
| South Asia | India | 30.0 | 22.4 | 52.4 |
| Oceania | Australia | 14.4 | 21.8 | 36.2 |
| | New Zealand | 14.0 | 19.2 | 33.2 |

## ▶ "I want to quit the current employment and go independent/start my own business"

| | | Completely agree | Slightly agree | Total |
|---|---|---|---|---|
| East Asia | Japan | 4.8 | 10.7 | 15.5 |
| | China | 17.7 | 25.2 | 42.9 |
| | Hong Kong | 6.9 | 20.4 | 27.3 |
| | Korea | 7.8 | 22.0 | 29.8 |
| | Taiwan | 8.7 | 21.2 | 29.9 |
| Southeast Asia | Indonesia | 25.1 | 31.3 | 56.4 |
| | Malaysia | 14.7 | 26.9 | 41.6 |
| | Philippines | 23.4 | 26.4 | 49.8 |
| | Singapore | 9.2 | 17.7 | 26.9 |
| | Thailand | 27.3 | 24.0 | 51.3 |
| | Vietnam | 20.1 | 24.6 | 44.7 |
| South Asia | India | 29.2 | 24.2 | 53.4 |
| Oceania | Australia | 10.5 | 15.4 | 25.9 |
| | New Zealand | 10.8 | 15.5 | 26.3 |

## ▶ Number of Times Changed Jobs

Q. How many times have you changed jobs?

Average number of times changed jobs (time)

| | | Average |
|---|---|---|
| East Asia | Japan | 2.9 |
| | China | 2.1 |
| | Hong Kong | 3.1 |
| | Korea | 2.5 |
| | Taiwan | 3.0 |
| Southeast Asia | Indonesia | 2.5 |
| | Malaysia | 2.8 |
| | Philippines | 2.8 |
| | Singapore | 3.1 |
| | Thailand | 2.6 |
| | Vietnam | 2.1 |
| South Asia | India | 2.4 |
| Oceania | Australia | 3.5 |
| | New Zealand | 3.9 |

### The majority of people are positive about their current place of work

When asked about continuing to work at their current place of employment, changing jobs, or going independent/starting their own business, many workers made it clear that, despite being satisfied to some extent with their current work, they were always on the lookout for the next opportunity. This trend was particularly strong in China and India. In answer to the question "Do you want to continue working at your current place of employment?," at least 80% of respondents stated "Completely agree" or "Slightly agree," while those who answered "I want to move to another job/company" accounted for 52.4% in India and 40.6% in China.

The actual number of job changes was at least 2 times on average for all countries/regions; Oceania had a particularly high count of at least 3.5 times on average, indicating the high mobility of human resources.

### Southeast Asia: high rates of job changing, independence and entrepreneurship

India has the highest rate of intention to change jobs at 52.4%, followed by Vietnam, Hong Kong, China and Singapore, all at 40% or more. The lowest rate was 25.1% in Japan. Although not presented here, a detailed analysis by age group showed that each country/region had higher willingness to change jobs at younger ages, while in India and Vietnam, the rate of intention to change jobs was in excess of 40% even for those in their 50s and older.

In India, China and Southeast Asia (excluding Singapore), more than 40% of workers expressed the desire to go independent or start their own companies. A detailed analysis by age group also showed that younger age groups tend to be more oriented toward independence and start-ups, but in China, Indonesia, the Philippines, Thailand, Vietnam and India, this rate was in excess of 40% even for those in their 50s and older. Looking at the average number of job changes, Oceania, Hong Kong, Taiwan and Singapore were all in excess of 3 times. In Japan, where the average number of job changes was close to 3, it seems to have been affected by restructuring in recent years and by the high rates of part-time/casual work among respondents.

### ╲ Opinions from the Field ╱

· In Southeast Asia, it is common practice to improve one's salary or position by changing jobs. If a worker has not changed jobs once or twice by around age 30, he/she is often viewed as having a passive attitude toward his/her career. Also, given the backdrop of growing economic markets, the strong intention to go independent or start up one's own company is often an expression of a desire to tackle challenges and pursue the Asian dream. From our experiences of engaging in outplacement in Indonesia in the past, only 20% of workers wanted support with re-employment, while 80% wanted to use their severance payments to go independent or start up their own companies.

· In Korea, there is a significant salary gap between large companies and SMEs, and people are increasingly seeking to build up their careers in order to later transfer to a major company with a higher salary. It is also hard to expect workers to reach retirement age after having worked only in a single workplace, and many people leave the workplace in their 50s. Therefore, rather than loyalty to a specific company, there is increasing support for the idea of moving to another company and seeking promotion there, if the opportunity arises.

· In Taiwan, the turnover rate is high among younger people, including new graduates, which is one factor driving the high number of job changes overall. Companies also tend to be reluctant about hiring new graduates due to concerns about the high turnover rate among young people, which in turn seems to further increase the unemployment rate among young people. As the rate of salary increase is definitely not high in Taiwan, many job seekers are hoping to increase their salary when they change jobs.

· In Hong Kong, changing jobs every 3 to 4 years is common, due to the strong consensus that changing jobs helps advance one's career. The labor market is also more dynamic, and employers are less likely to view job-changers negatively. Conversely, the cost of living is high in Hong Kong (especially the soaring rents), so if their desired salaries are not met, workers tend to raise their income by changing jobs. On top of this is the fact that restrictions on dismissal are loose and guarantees of employment are weak, which also increases the desire to change jobs. As a guideline, the rate of salary increase for workers staying at the same company is about 5% at best, but when changing jobs, they can often raise their salaries by 10% or more.

# The two main reasons for changing jobs are "salary" and "growth"

Dissatisfaction with salary ranked high in many countries/regions.
In Southeast Asia, changing jobs is seen as an opportunity to expand one's career.

▶ **Reasons for Changing jobs  TOP 10 Rankings in Each Country/Region**

Q.  What is your reason for changing jobs from the last company to your current company?
Please select all the items that apply to how you felt at that time.  (Multiple responses /29 options)

*Items are colored using the same colors as those used for the Top 3 items for the average of all 14 countries/regions. ■ No. 1  ■ No. 2  ■ No. 3
*Figures in parenthesis represent the number of respondents who changed jobs.

| | East Asia | | | | | Southeast Asia | | Southeast Asia | | | South Asia | Oceania | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | **Japan** (681) | **China** (710) | **Hong Kong** (891) | **Korea** (742) | **Taiwan** (852) | **Indonesia** (853) | **Malaysia** (830) | **Philippines** (825) | **Singapore** (866) | **Thailand** (802) | **Vietnam** (764) | **India** (815) | **Australia** (901) | **New Zealand** (904) | |
| **1st** | I was dissatisfied with my salary 22.2% | I was dissatisfied with my salary 25.9% | I was dissatisfied with my salary 35.8% | The company's prospects were uncertain 24.1% | I was dissatisfied with my salary 28.9% | I wanted to build a broad base of experience and knowledge 37.6% | I wanted to build a broad base of experience and knowledge 33.9% | I was dissatisfied with my salary 28.7% | I was dissatisfied with my salary 21.1% | I was dissatisfied with my salary 33.2% | I wanted to build a broad base of experience and knowledge 27.7% | I wanted to build a broad base of experience and knowledge 24.9% | I wanted to work at a company with a more friendly and harmonious atmosphere 16.2% | I wanted to work at a company with a more friendly and harmonious atmosphere 17.6% | **1st** |
| **2nd** | Interpersonal relationships did not work well 21.4% | There were no prospects for promotion 23.8% | There were no prospects for promotion 20.9% | I was dissatisfied with my salary 21.8% | The company's prospects were uncertain 22.4% | I was dissatisfied with my salary 30.4% | I was dissatisfied with my salary 27.2% | I wanted to build a broad base of experience and knowledge 24.8% | There were no prospects for promotion 20.7% | I wanted to build a broad base of experience and knowledge 30.3% | I wanted to acquire specialist knowledge/ technical capabilities 25.4% | I wanted to change the status of my employment 24.5% | There was other work I wanted to do 15.8% | There were no prospects for promotion 16.7% | **2nd** |
| **3rd** | The company's prospects were uncertain 19.7% | I wanted to build a broad base of experience and knowledge 21.8% | I wanted to build a broad base of experience and knowledge 18.5% | I wanted to build a broad base of experience and knowledge 16.3% | I wanted to build a broad base of experience and knowledge 20.4% | I wanted to work at a company with a more friendly and harmonious atmosphere 25.3% | I wanted to acquire specialist knowledge/ technical capabilities 21.7% | I wanted to work at a company with a more friendly and harmonious atmosphere 23.3% | I wanted to work at a company with a more friendly and harmonious atmosphere 18.0% | I wanted to work at a company with a more friendly and harmonious atmosphere 26.4% | My salary did not change even if I was evaluated highly 19.6% | I wanted to work at a company with a more friendly and harmonious atmosphere 23.4% | The environment was very oppressive (it was not easy or conducive to sharing opinions) 15.4% | I was dissatisfied with my salary 16.7% | **3rd** |
| **4th** | It was physically demanding 18.9% | I wanted to acquire specialist knowledge/ technical capabilities 21.3% | There was too much overtime work/not enough days off 16.2% | It was physically demanding 16.2% | There was other work I wanted to do 18.0% | My salary did not change even if I was evaluated highly 23.4% | I wanted to work at a company with a more friendly and harmonious atmosphere 21.6% | My salary did not change even if I was evaluated highly 22.7% | I wanted to build a broad base of experience and knowledge 17.6% | The company's prospects were uncertain 18.7% | There were no prospects for promotion 19.4% | I wanted to acquire specialist knowledge/ technical capabilities 21.1% | There were no prospects for promotion 15.1% | There was other work I wanted to do 16.5% | **4th** |
| **5th** | I was dissatisfied with the company's assessment methods 18.8% | My salary did not change even if I was evaluated highly 18.0% | The company's prospects were uncertain 15.7% | There was too much overtime work/not enough days off 17.0% | There were no prospects for promotion 17.0% | The company's prospects were uncertain 21.1% | My salary did not change even if I was evaluated highly 21.2% | There were no prospects for promotion 19.3% | The company's prospects were uncertain 16.3% | There was other work I wanted to do 18.3% | I wanted to work at a company with a more friendly and harmonious atmosphere 18.6% | I was dissatisfied with my salary 20.0% | I wanted to change the status of my employment 15.1% | The environment was very oppressive (it was not easy or conducive to sharing opinions) 13.6% | **5th** |
| **6th** | My salary did not change even if I was evaluated highly 18.6% | The company's prospects were uncertain 17.2% | There was other work I wanted to do 15.0% | The environment was very oppressive (it was not easy or conducive to sharing opinions) 13.7% | I wanted to acquire specialist knowledge/ technical capabilities 16.2% | I was dissatisfied with the company's assessment methods 20.8% | There was other work I wanted to do 19.9% | There was other work I wanted to do 18.3% | The environment was very oppressive (it was not easy or conducive to sharing opinions) 14.8% | There were no prospects for promotion 17.5% | I was dissatisfied with my salary 17.8% | My salary did not change even if I was evaluated highly 20.0% | I was dissatisfied with my salary 14.0% | I wanted to change the status of my employment 13.4% | **6th** |
| **7th** | There was no one there I could respect 18.4% | The industry's future was uncertain 16.3% | I wanted to acquire specialist knowledge/ technical capabilities 12.6% | I wanted to have weekends and holidays off 13.6% | The environment was very oppressive (it was not easy or conducive to sharing opinions) 15.4% | There were no prospects for promotion 20.5% | There were no prospects for promotion 19.6% | I wanted to acquire specialist knowledge/ technical capabilities 17.5% | There wasn't an employee cultivating environment 14.0% | The environment was very oppressive (it was not easy or conducive to sharing opinions) 17.2% | There was other work I wanted to do 17.0% | There were no prospects for promotion 16.1% | My salary did not change even if I was evaluated highly 12.1% | My salary did not change even if I was evaluated highly 12.6% | **7th** |
| **8th** | The environment was very oppressive (it was not easy or conducive to sharing opinions) 18.1% | I wanted to work at a company with a more friendly and harmonious atmosphere 16.2% | My salary did not change even if I was evaluated highly 12.1% | I wanted to acquire specialist knowledge/ technical capabilities 12.8% | There wasn't an employee cultivating environment 14.9% | Interpersonal relationships did not work well 20.4% | I wanted to change the status of my employment 18.9% | I wanted to change the status of my employment 17.2% | There was other work I wanted to do 13.4% | I wanted to have weekends and holidays off 16.6% | Interpersonal relationships did not work well 13.5% | There was too much overtime work/not enough days off 12.0% | I wanted to build a broad base of experience and knowledge 12.0% | I wanted to build a broad base of experience and knowledge 11.2% | **8th** |
| **9th** | There wasn't an employee cultivating environment 17.9% | There was too much overtime work/not enough days off 15.8% | The environment was very oppressive (it was not easy or conducive to sharing opinions) 11.8% | I wanted to change the status of my employment 12.3% | I wanted to work at a company with a more friendly and harmonious atmosphere 13.6% | I wanted to acquire specialist knowledge/ technical capabilities 16.8% | The company's prospects were uncertain 18.6% | I wanted to have weekends and holidays off 15.0% | My salary did not change even if I was evaluated highly 13.3% | I wanted to acquire specialist knowledge/ technical capabilities 16.3% | The environment was very oppressive (it was not easy or conducive to sharing opinions) 13.2% | The environment was very oppressive (it was not easy or conducive to sharing opinions) 14.6% | There wasn't an employee cultivating environment 10.9% | Interpersonal relationships did not work well 10.6% | **9th** |
| **10th** | There was too much overtime work/not enough days off 17.6% | There wasn't an employee cultivating environment 15.4% | I wanted to have weekends and holidays off 11.3% / I wanted to work at a company with a more friendly and harmonious 11.3% | Interpersonal relationships did not work well 11.5% | I wanted to have weekends and holidays off 13.3% | I wanted to acquire specialist knowledge/ technical capabilities 15.7% | I wanted to have weekends and holidays off 15.9% | I was dissatisfied with the company's assessment methods 13.9% | I wanted to acquire specialist knowledge/ technical capabilities 13.2% | There wasn't an employee cultivating environment 16.1% / I wanted to change the status of my employment 16.1% | The company's prospects were uncertain 11.4% | Interpersonal relationships did not work well 13.9% | I wanted to acquire specialist knowledge/ technical capabilities 10.7% | The company's prospects were uncertain 10.3% | **10th** |

## Changing jobs in hopes of growth is common in Southeast Asia and India

When those with experience in changing jobs were asked about their reasons for changing jobs, one reason common across all countries/regions was "I was dissatisfied with my salary." In addition, another reason for changing jobs in many countries/regions was dissatisfaction with treatment, with the responses "There were no prospects for promotion" and "My salary did not change even if I was evaluated highly" ranking high in China, Hong Kong, Singapore, Vietnam and New Zealand. It is evident that seeking better conditions is one major reason for changing jobs.

On the other hand, "I wanted to build a broad base of experience and knowledge" ranked first in Indonesia, Malaysia, Vietnam, and India, and ranked second in the Philippines and Thailand.

In countries/regions where lifetime employment is not assumed, what you were doing is often more important than where you worked for changing jobs and career development. For this reason, in order to achieve better salaries or better treatment by changing jobs, workers often seek to acquire the experience and knowledge needed for changing jobs while working in their current positions. Also, the response "I wanted to work at a company with a more friendly and harmonious atmosphere" ranked high in many countries/regions, which seems to indicate an emphasis on workplace atmosphere.

## Anxiety about company or industry is a reason for changing jobs in East Asia

In Japan, Korea and Taiwan, "The company's prospects were uncertain" was ranked in the top 3 responses, offering a glimpse of concern about the future of the company or the industry. In Japan, "Interpersonal relationships did not work well" and "It was physically demanding" both ranked in the top 5, indicating a tendency to change jobs due to mental or physical stress.

In Australia and New Zealand, there were no particularly outstanding responses. The top-ranked response was "I wanted to work at a company with a more friendly and harmonious atmosphere."
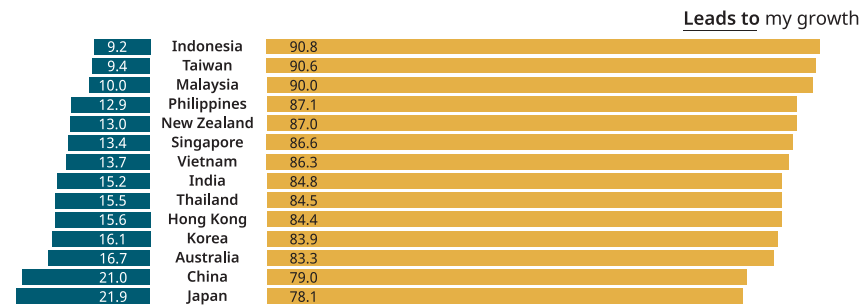
### ╲ Opinions from the Field ╱

· Across the whole of Asia, a change of job is often regarded as a means to develop one's career, and many forward-looking reasons for changing jobs are evident from the perspective of seeking new challenges leading to further growth.
· In China in particular, the mainstream consensus is that workers want to change jobs because the new job is more challenging, and jobs that aren't challenging are boring or not worth doing. More challenging jobs are also linked with increased salaries.
· In Taiwan, the IT/semiconductor industry, a key industry in the country, is easily swayed by major foreign companies as well as the Chinese economy. This situation is believed to make it difficult for workers to clearly see the company's future. On the other hand, it also seems that some companies have low-performing older employees who just stay in place, negatively impacting the productivity of the organization.
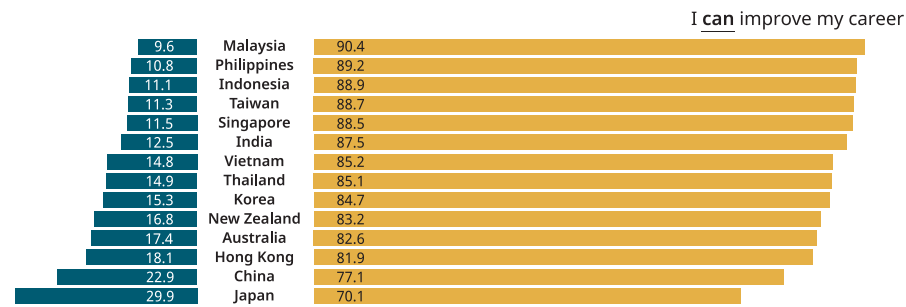
# Positive effects of changing jobs

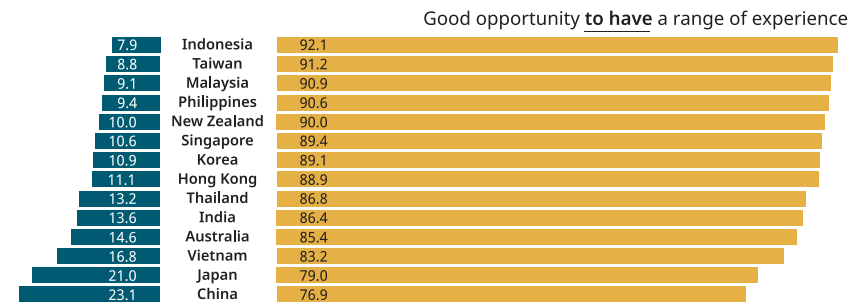What about income? Career? Market value?
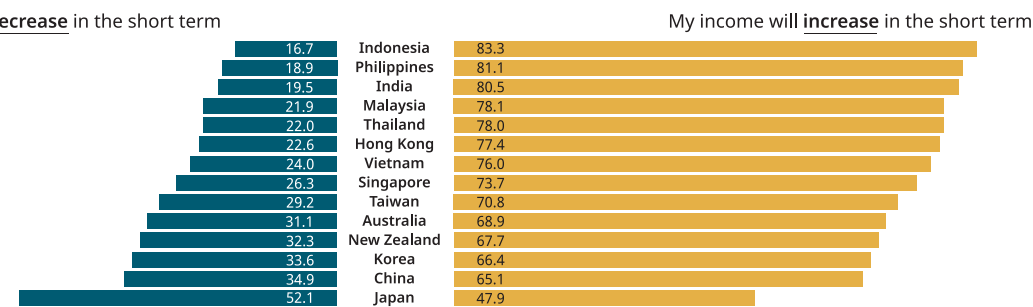
## ▶ Effects of Changing Jobs

**Does not lead to** my growth / **Leads to** my growth

| Does not lead | Country | Leads to |
|---|---|---|
| 9.2 | Indonesia | 90.8 |
| 9.4 | Taiwan | 90.6 |
| 10.0 | Malaysia | 90.0 |
| 12.9 | Philippines | 87.1 |
| 13.0 | New Zealand | 87.0 |
| 13.4 | Singapore | 86.6 |
| 13.7 | Vietnam | 86.3 |
| 15.2 | India | 84.8 |
| 15.5 | Thailand | 84.5 |
| 15.6 | Hong Kong | 84.4 |
| 16.1 | Korea | 83.9 |
| 16.7 | Australia | 83.3 |
| 21.0 | China | 79.0 |
| 21.9 | Japan | 78.1 |

**I cannot improve my career** / **I can improve my career**

| cannot | Country | can |
|---|---|---|
| 9.6 | Malaysia | 90.4 |
| 10.8 | Philippines | 89.2 |
| 11.1 | Indonesia | 88.9 |
| 11.3 | Taiwan | 88.7 |
| 11.5 | Singapore | 88.5 |
| 12.5 | India | 87.5 |
| 14.8 | Vietnam | 85.2 |
| 14.9 | Thailand | 85.1 |
| 15.3 | Korea | 84.7 |
| 16.8 | New Zealand | 83.2 |
| 17.4 | Australia | 82.6 |
| 18.1 | Hong Kong | 81.9 |
| 22.9 | China | 77.1 |
| 29.9 | Japan | 70.1 |

**I cannot build on my experience** / Good opportunity **to have** a range of experience

| cannot | Country | to have |
|---|---|---|
| 7.9 | Indonesia | 92.1 |
| 8.8 | Taiwan | 91.2 |
| 9.1 | Malaysia | 90.9 |
| 9.4 | Philippines | 90.6 |
| 10.0 | New Zealand | 90.0 |
| 10.6 | Singapore | 89.4 |
| 10.9 | Korea | 89.1 |
| 11.1 | Hong Kong | 88.9 |
| 13.2 | Thailand | 86.8 |
| 13.6 | India | 86.4 |
| 14.6 | Australia | 85.4 |
| 16.8 | Vietnam | 83.2 |
| 21.0 | Japan | 79.0 |
| 23.1 | China | 76.9 |

**My income will decrease in the short term** / **My income will increase in the short term**

| decrease | Country | increase |
|---|---|---|
| 16.7 | Indonesia | 83.3 |
| 18.9 | Philippines | 81.1 |
| 19.5 | India | 80.5 |
| 21.9 | Malaysia | 78.1 |
| 22.0 | Thailand | 78.0 |
| 22.6 | Hong Kong | 77.4 |
| 24.0 | Vietnam | 76.0 |
| 26.3 | Singapore | 73.7 |
| 29.2 | Taiwan | 70.8 |
| 31.1 | Australia | 68.9 |
| 32.3 | New Zealand | 67.7 |
| 33.6 | Korea | 66.4 |
| 34.9 | China | 65.1 |
| 52.1 | Japan | 47.9 |

**My income will decrease in the long term** / **My income will increase in the long term**

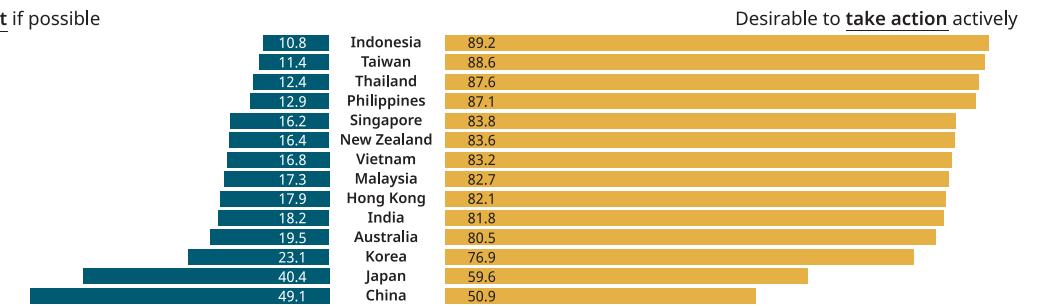| decrease | Country | increase |
|---|---|---|
| 8.6 | Indonesia | 91.4 |
| 11.1 | Philippines | 88.9 |
| 11.3 | Malaysia | 88.7 |
| 12.4 | Singapore | 87.6 |
| 13.7 | Taiwan | 86.3 |
| 14.0 | Thailand | 86.0 |
| 14.6 | New Zealand | 85.4 |
| 14.7 | Hong Kong | 85.3 |
| 15.8 | Australia | 84.2 |
| 15.9 | Vietnam | 84.1 |
| 16.1 | India | 83.9 |
| 17.6 | China | 82.4 |
| 17.6 | Korea | 82.4 |
| 36.1 | Japan | 63.9 |

Q. Which one is closest to your impression of changing jobs? (%)

**I would have difficulties** achieving promotion after changing jobs / **I can take opportunities to** achieve promotion after changing jobs

| difficulties | Country | can take opportunities |
|---|---|---|
| 14.5 | Indonesia | 85.5 |
| 16.1 | Philippines | 83.9 |
| 18.6 | Malaysia | 81.4 |
| 18.7 | Singapore | 81.3 |
| 19.2 | Vietnam | 80.8 |
| 20.4 | India | 79.6 |
| 21.2 | Taiwan | 78.8 |
| 21.3 | Hong Kong | 78.7 |
| 25.2 | Australia | 74.8 |
| 25.7 | New Zealand | 74.3 |
| 28.8 | Thailand | 71.2 |
| 30.7 | China | 69.3 |
| 35.8 | Korea | 64.2 |
| 52.6 | Japan | 47.4 |

Desirable to **avoid it** if possible / Desirable to **take action** actively

| avoid | Country | take action |
|---|---|---|
| 10.8 | Indonesia | 89.2 |
| 11.4 | Taiwan | 88.6 |
| 12.4 | Thailand | 87.6 |
| 12.9 | Philippines | 87.1 |
| 16.2 | Singapore | 83.8 |
| 16.4 | New Zealand | 83.6 |
| 16.8 | Vietnam | 83.2 |
| 17.3 | Malaysia | 82.7 |
| 17.9 | Hong Kong | 82.1 |
| 18.2 | India | 81.8 |
| 19.5 | Australia | 80.5 |
| 23.1 | Korea | 76.9 |
| 40.4 | Japan | 59.6 |
| 49.1 | China | 50.9 |

### Awareness of "growth" and "career advancement" encourages a positive attitude toward changing jobs

When asked about the effects of changing jobs in a two-option selection format, responses such as "Leads to my growth" and "I can improve my career" ranked at 70% or higher, which shows evidence of positive effects of job change. On the other hand, responses related to "income" and "promotion & advancement" varied widely between positive and negative.

Let's take a look at some distinctive countries/regions. In Indonesia and other Southeast Asian countries, more than 80% of respondents said that it is "Desirable to take action actively. "Workers seem to want income, growth and career advancement. Changing jobs was viewed as a good opportunity to increase one's market value.

In Oceania, changing jobs was regarded as an opportunity for growth and career advancement, but almost 30% believed that it is somewhat disadvantageous in terms of short-term income.

### Some caution about changing jobs evident in China & Japan

In China, about 50% of people thought changing jobs is "Desirable to avoid if possible" – an even split between active and cautious attitudes.

In Japan, nearly 80% saw changing jobs as an opportunity leading to growth, but about 40% described it as "Desirable to avoid if possible. "More than 50% of people believed that "I would have difficulties achieving promotion after changing jobs. "This highlighted the impact of Japanese-style employment practices such as reliance on batch recruitment of new graduates, a strong tendency towards lifelong employment, and low employment fluidity.

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### ╲ Opinions from the Field ╱

· As workers in ASEAN countries generally consider changing jobs as a way to improve their careers, there is basically no negative effect. On the other hand, due to different stances on changing jobs, when a Japanese company is hiring local employees after entering the Asian market, numerous job changes may be assessed as a negative factor for applicants.
· Japan still shows strong inward-oriented and conservative tendencies.
· Korea tends to regard changing jobs negatively, and survey results have shown that "over 90% of HR personnel would negatively evaluate a candidate with numerous job changes."
· In Taiwan, changing jobs is viewed positively as an opportunity to be evaluated as having more advanced skills and experience.

# Why do you wish to continue working?

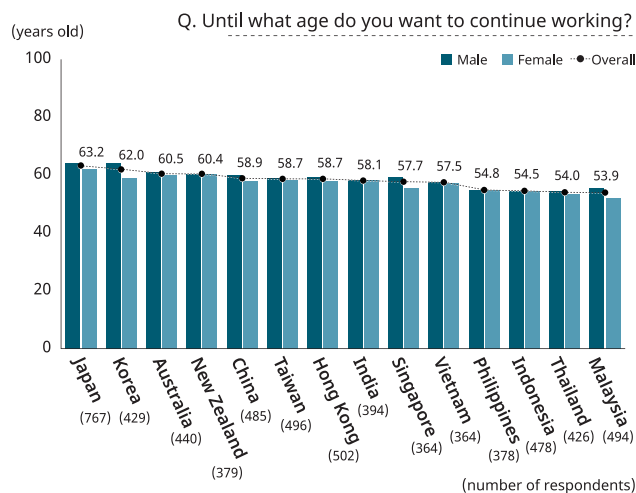Maintaining the same levels of "income" and "health" is one common reason for working.

▶ Reason for Working　TOP 10 Rankings in Each Country/Region

Q. Please select all reasons why you want to continue to work until that age. (Multiple responses / 18 options)

*Items are colored using the same colors as those used for the Top 3 items for the average of all 14 countries/regions. ■ No. 1　■ No. 2　■ No. 3

## East Asia

| | Japan | China | Hong Kong | Korea | Taiwan | Indonesia | Malaysia | | Philippines | Singapore | Thailand | Vietnam | India | Australia | New Zealand | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| **1st** | I need to earn to maintain my life 69.7% | I need to earn to maintain my life 43.2% | I need to earn to maintain my life 54.4% | I need to earn to maintain my life 60.1% | I need to earn to maintain my life 59.5% | I want to keep myself healthy by working 52.0% | I need to earn to maintain my life 54.4% | | I have a dream and goals to achieve 59.8% | I want to keep myself healthy by working 55.5% | I want to feel rewarded through my work 50.8% | I want to contribute to society through working 43.3% | I want to keep myself healthy by working 53.5% | I need to earn to maintain my life 53.0% | I want to keep myself healthy by working 53.7% | **1st** |
| **2nd** | I want to keep myself healthy by working 38.5% | I want to keep myself healthy by working 37.4% | I would have too much time if I didn't work 37.0% | I want to keep myself healthy by working 44.7% | I want to feel rewarded through my work 39.1% | I have a dream and goals to achieve 47.0% | I want to keep myself healthy by working 49.3% | | I need to earn to maintain my life 57.5% | I need to earn to maintain my life 51.6% | I need to earn to maintain my life 46.5% | I need to earn to maintain my life 41.9% | I need to earn to maintain my life 46.4% | I want to keep myself healthy by working 47.1% | I need to earn to maintain my life 52.8% | **2nd** |
| **3rd** | I want to make money for my hobbies 33.5% | I want to feel rewarded through my work 33.9% | I want to keep myself healthy by working 36.7% | I want to feel rewarded through my work 44.5% | I want to grow through my work 38.8% | I need to earn to maintain my life 45.2% | I have a dream and goals to achieve 45.3% | | I want to keep myself healthy by working 56.3% | I would have too much time if I didn't work 34.8% | It is common to work at my age 42.4% | I want to make money for my hobbies 39.7% | I want to grow through my work 42.9% | I want to feel rewarded through my work 33.1% | I want to make money for my hobbies 39.0% | **3rd** |
| **4th** | I would have too much time if I didn't work 26.9% | I want to contribute to society through working 31.9% | I want to feel rewarded through my work 29.5% | I want to make money for my hobbies 30.5% | I can make friends and companions through my work 32.1% | I want to grow through my work 45.0% | I need to make money to raise my children 39.0% | | I want to grow through my work 43.1% | I want to feel rewarded through my work 31.7% | I have a dream and goals to achieve 34.7% | It is common to work at my age 37.3% | I have a dream and goals to achieve 42.4% | I want to make money for my hobbies 30.9% | I want to feel rewarded through my work 35.2% | **4th** |
| **5th** | I want to feel rewarded through my work 26.7% | I want to grow through my work 30.9% | I want to make money for my hobbies 29.3% | I want to grow through my work 26.1% | I have a dream and goals to achieve 30.3% | I need to make money to raise my children 40.3% | I want to contribute to society through working 35.2% | | I want to pass down my knowledge and skills 42.5% | I want to make money for my hobbies 27.1% | I want to make money for my hobbies 33.7% | I have a dream and goals to achieve 37.0% | I want to pass down my knowledge and skills 38.6% | I have a dream and goals to achieve 30.4% | I want to contribute to society through working 31.5% | **5th** |
| **6th** | I want to contribute to society through working 20.5% | I would have too much time if I didn't work 29.7% | It is common to work at my age 27.1% | I would have too much time if I didn't work 25.7% | I want to make money for my hobbies 29.7% | I want to pass down my knowledge and skills 36.6% | I would have too much time if I didn't work 34.1% | | I want to feel rewarded through my work 41.6% | I can make friends and companions through my work 26.4% | I need to make money to raise my children 32.2% | I want to keep myself healthy by working 35.2% | I want to feel rewarded through my work 37.4% | I want to contribute to society through working 27.8% | I have a dream and goals to achieve 30.8% | **6th** |
| **7th** | It is an age limit for working considering physical condition 20.3% | I can make friends and companions through my work 29.3% | I have enough savings to live on after retirement 23.7% | It is common to work at my age 24.1% | I want to keep myself healthy by working 28.7% | I want to contribute to society through working 34.7% | I want to grow through my work 33.3% | | I need to make money to raise my children 40.5% | I want to contribute to society through working 25.5% | I want to pass down my knowledge and skills 32.2% | I need to make money to raise my children 35.1% | I want to contribute to society through working 35.2% | I want to grow through my work 26.8% | I would have too much time if I didn't work 29.3% | **7th** |
| **8th** | I can make friends and companions through my work 18.9% | I want to make money for my hobbies 27.7% | I want to grow through my work 23.4% | I have a dream and goals to achieve 21.2% | I need to make money to raise my children 25.5% | It is common to work at my age 31.4% | I want to pass down my knowledge and skills 32.4% | | I want to contribute to society through working 40.0% | I want to grow through my work 23.6% | I want to grow through my work 31.8% | I want to pass down my knowledge and skills 35.0% | I want to make money for my hobbies 33.5% | It is common to work at my age 25.1% | I can make friends and companions through my work 27.3% | **8th** |
| **9th** | I need to make money to raise my children 17.9% | I have a dream and goals to achieve 26.4% | I can make friends and companions through my work 20.3% | I want to contribute to society through working 20.7% | It is common to work at my age 24.9% | I want to make money for my hobbies 30.4% | I can make friends and companions through my work 31.2% | | I want to make money for my hobbies 34.6% | I need to make money to raise my children 23.0% | I have enough savings to live on after retirement 31.1% | I want to grow through my work 30.9% | I need to make money to raise my children 29.2% | I can make friends and companions through my work 24.5% | It is common to work at my age 26.5% | **9th** |
| **10th** | I want to grow through my work 17.8% | I need to make money to raise my children 25.2% | I have a dream and goals to achieve 19.2% | I can make friends and companions through my work 20.5% | I want to contribute to society through working 24.7% | I can make friends and companions through my work 28.0% | I want to feel rewarded through my work 31.1% / I want to make money for my hobbies 31.1% | | I can make friends and companions through my work 33.6% | It is common to work at my age 21.1% | I want to contribute to society through working 30.4% | I can make friends and companions through my work 29.4% | I can make friends and companions through my work 28.8% | I would have too much time if I didn't work 23.8% | I want to grow through my work 25.8% | **10th** |

Southeast Asia — South Asia — Oceania

▶ Desirable Age of Retirement

(years old)

Q. Until what age do you want to continue working?

■ Male　■ Female　●Overall

63.2　62.0　60.5　60.4　58.9　58.7　58.7　58.1　57.7　57.5　54.8　54.5　54.0　53.9

Japan (767)　Korea (429)　Australia (440)　New Zealand (379)　China (485)　Taiwan (496)　Hong Kong (502)　India (394)　Singapore (364)　Vietnam (364)　Philippines (378)　Indonesia (478)　Thailand (426)　Malaysia (494)

(number of respondents)

## The desire to work until an older age was higher in Japan than any other country/region

The response to "Until what age do you want to continue working?" was highest in Japan at 63.2 years, followed by Korea, Australia and New Zealand, all at over 60 years. In Southeast Asia, the desired retirement age was under 58 years of age, dropping to under 55 years in the case of the Philippines, Indonesia, Thailand and Malaysia. Differences across countries/regions also had a relationship to average life expectancies. Although not presented here as a graph, looking at the data by age group, Japanese people in their 60s answered that they wanted to keep working until the age of 70.5 – a distinctive attitude of intending to keep working into old age.

## "I need to earn to maintain my life" ranked in the top 3 across all countries/regions

Across all countries/regions, maintaining "life" and "health" was highly ranked as a reason for working. Many other positive responses ranked high, including "I want to feel rewarded through my work," "I want to grow through my work," and "I want to contribute to society through work." In Indonesia, Malaysia, the Philippines, etc., the response "I have a dream and goals to achieve" also ranked high.

On the other hand, negative reasons such as "I would have too much time if I didn't work" were also seen in some countries and regions.

In Hong Kong and Thailand, "I have enough savings to live on after retirement" also ranked high, and it seems that a certain number of people would not work unless they needed to support themselves.

### ╲ Opinions from the Field ╱

· The life expectancy in Southeast Asian countries is still short, and the retirement age is generally around 55 years old. The idea that "work = life" is stronger in developed countries, where people may feel anxiety about being unable to support their lives without working for many years. After talking with local employees in Asian nations, it is clear that many people in emerging countries come to have dreams and goals through their work.

· In Taiwan, to maintain their lifestyles, couples tend to keep working together into old age. Many people consider work colleagues on the same level as family and friends, and many spend their weekends with colleagues. Employee trips have become a popular company benefit.

· The retirement age in Hong Kong is generally between 60 and 65 years, but many examples are cited of people working after retirement age – either to maintain their lifestyles or because they would have too much spare time if not working.

· Although perhaps not a representative example, in Malaysia there was a case of a worker who had retired early in his 50s, but had a lot of free time at home, so he started working as a driver for Grab.

# Key Points of Labor Legislation and Practices

The following are the key points that should be taken into account in labor management relations
when doing business in the following countries and regions.

<Supervision> Tetsuo Kurita - Representative Partner of One Asia Lawyers/Attorney at law, qualified in Singapore, Japan, and NY

**The full version of the Labor Legislation and Practice is available**
"Key Points of Labor Legislation and Practice" is an excerpt from the full version of Labor Legislation and
Practice, which can be downloaded from the website using the QR code (right) or URL (below).

**https://rc.persol-group.co.jp/hr-data/en/**

## ▶ Japan

Japanese labor laws emphasize protection of workers as rules separate from the Civil Code. As many relevant laws have been amended to meet the needs of the times, companies need to update the information regarding such amendments. From 1 April 2019, "Work Style Reform Laws" including eight labor laws (mainly the Labor Standards Act) will be implemented accordingly.

[ POINT ]
| | | |
|---|---|---|
| Basic matters | : | Basic matters are stipulated in relevant labor laws and regulations, mainly the Labor Standards Act, the Labor Union Act, and the Labor Relations Adjustment Act. |
| Work rules | : | Employers that usually employ ten or more workers are required to develop work rules and announce them to employees. Companies need to check the provisions of their work rules regarding paid annual leave, how to manage working hours, and more in line with the amendments of labor laws in 2019. |
| Dismissal | : | Japanese labor laws require justifiable grounds for dismissal. They are characterised by the requirement for verification as to whether the grounds for dismissal correspond to the reasons listed in the relevant work rules. As for retrenchment, companies are required to show that their dismissal procedures and operations are appropriate in terms of how to select the employees to be dismissed and how they discussed it with the employees, as well as to show the necessity for the employer to retrench their employees and their effort to avoid dismissal. |
| Visa | : | Workers must obtain certain visa status to work in Japan. Compared to neighbouring countries, it is considered difficult to obtain such a visa in Japan. However, the government is considering lowering the hurdle in line with the revision of the Immigration Control and Refugee-Recognition Law in April 2019 due to workforce shortages and other reasons. |

## ▶ China

In China, a relatively high degree of protection is offered to employees. Specifically, there are restrictions on the grounds for dismissal when dismissing employees and companies are required to pay retirement benefits and to purchase unused annual paid leave. As pressure for increasing the minimum wage has been strong across the country in recent years, corporate HR managers should pay attention to this point.

[ POINT ]
| | | |
|---|---|---|
| Basic matters | : | Basic matters concerning labor-management relations are mainly set out in the Labor Law and Labor Contract Law. |
| Work rules | : | Companies are required to establish and implement a comprehensive work rule system to ensure the rights of workers. |
| Wages | : | Wages generally include basic wages, bonuses, allowances, overtime pay and other payments. Wage levels vary considerably from one region to another. |
| Dismissal | : | A labor contract may be terminated based on an agreement between labor and management. In addition, termination of a labor contract can take the form of "termination by prior notice" or "immediate termination" initiated by either the company or employee, subject to there being certain statutory grounds for the termination. |
| Visa | : | Japanese nationals can stay in China without a visa for up to 14 days. However, in some cases, persons who repeat short-term no-visa visits for commercial purposes may be required to obtain an M-visa. |

## ▶ Hong Kong

Under the basic policy of the government aiming for economic development of the region, there is a tendency to place relative emphasis on the convenience of the economic activities of companies, i.e. employers.

[ POINT ]
| | | |
|---|---|---|
| Basic matters | : | The Employment Ordinance prescribes basic matters related to employment including the contents of employment contracts, wages, holidays, allowances, maternity and child-care benefits, year-end allowances, and expiration (termination) of employment contracts. |
| Work rules | : | Irrespective of the number of employees, it is not mandatory for companies in Hong Kong to develop work rules and submit them to the relevant authority. |
| Wages | : | Overtime pay is included in the scope of wages. It should be noted that the employer may become liable to prosecution for unpaid wages in some cases. |
| Dismissal | : | Termination of an employment contract can take the form of termination by advance notice or by payment of money in lieu of notice, immediate dismissal, or reorganisation. |
| Visa | : | When foreign nationals wish to work in Hong Kong, they are expected to benefit Hong Kong, bring in special skills, knowledge, or experience not available in Hong Kong, or contribute substantially to the Hong Kong economy. |

## ▶ Korea

The government is taking policies to accelerate encouraging higher minimum wages and a shift from non-regular employment to regular employment.

[ POINT ]
| | | |
|---|---|---|
| Basic matters | : | Workers are guaranteed minimum labor standards pursuant to the Labor Standards Act and similar laws and regulations. Companies cannot dismiss workers without justifiable grounds and a high degree of justification is required to prove the grounds. |
| Work rules | : | Companies that regularly employ more than ten workers are required to develop work rules and submit them to the Minister of Employment and Labor. |
| Wages | : | Minimum wages apply in principle to all businesses and workplaces that employ one or more worker(s). |
| Dismissal | : | Ordinary dismissal must be based on justifiable reasons. If a worker is held responsible to the extent of being unable to maintain the labor contract, and when such responsibility is prescribed in the work rules of the company, the dismissal will be held valid as long as it does not violate the Labor Standards Act and is found reasonable. |
| Visa | : | Japanese nationals visiting Korea for sightseeing, simple visits, and other purposes for a period not exceeding 90 days are not required to obtain a visa. However, even when the period of stay does not exceed 90 days, any person wishing to enter Korea for short-term working activities or commercial activities to gain profit may be required to obtain a visa for short-term employment (C-4) and the like. |

## ▶ Taiwan

In 2017 and 2018, the Labor Standards Act was amended successively and as a result of which the following changes have been introduced: increase in the overtime pay on rest days, increase in the number of paid leave days, imposition of an obligation on companies to purchase unused paid leave, strengthened labor inspections, and raise in non-penal fines for violations.

[ POINT ]
| | | |
|---|---|---|
| Basic matters | : | Basic labor-related matters are stipulated in the Labor Standards Act. |
| Work rules | : | Companies that employ 30 or more workers must develop work rules and submit them to the relevant government agency within 30 days of their development, announce them in the workplace and then print them to distribute to each employee. |
| Wages | : | Taiwan has a minimum wage system. Since 1 January 2018, the monthly minimum wage has been NTD 22,000 per month and NTD 140 per hour. |
| Dismissal | : | There are restrictions on the grounds for dismissal and dismissal can take the form of "dismissal by notice" or "immediate dismissal." |
| Visa | : | To employ foreign workers, companies must apply for work permits at Workforce Development. |

## ▶ Indonesia

As Indonesia is a country offering extensive protection of workers, companies wishing to do business in Indonesia will have to consider various factors regarding their business development including restrictions on dismissal. Religious matters must also be considered.

[ POINT ]
| | | |
|---|---|---|
| Basic matters | : | The Labor Law and Civil Code have provisions on labor contracts. |
| Work rules | : | Companies which employ at least 10 workers are required to develop work rules. Unless a company has a collective agreement with its workers, companies must develop work rules and have them approved by the Minister of the Ministry of Manpower and Transmigration or a person in lieu of the Minister (this is mandatory for foreign companies regardless of number of employees). |
| Wages | : | TRetirement allowances include: 1) severance pay, 2) reward for service, 3) compensation pay, and 4) detachment money. Calculation of the retirement allowance is stipulated in the Labor Law and specific formulae for each category of payment are also stipulated in the Labor Law for each ground for dismissal. |
| Dismissal | : | Designed highly favourable to workers. |
| Visa | : | Workers must obtain a working visa (312) in order to work in Indonesia. |

## ▶ Malaysia

The Minimum Wage Order was revised on 1 January 2019, and amendments to labor related laws are expected to be implemented in the near future (expansion of the scope of "worker" to which the Employment Act applies, changes in the scope of weekly working hours, late-night work and leave, and changes in the conditions to establish labor unions, etc.)

[ POINT ]
| | | |
|---|---|---|
| Basic matters | : | The Employment Act applies to some workers and provides a minimum standard of working conditions. |
| Work rules | : | Companies are not legally required to develop work rules and there are no laws in which work rules are defined or prescribed. |
| Wages | : | Companies are required to pay overtime pay to employees covered by the Employment Act pursuant to provisions of laws. |
| Dismissal | : | As dismissal requires justifiable reasons and unfair dismissal may be contested at a later date, it is important to preserve objective evidence in advance to avoid any trouble. |
| Visa | : | It is common to obtain employment passes to work in Malaysia and such passes are classified into three main categories according to salary amount and employment contract period. |

## ▶ Philippines

In the Philippines, the Labor Code applies to all workers and the legal framework of labor law is favourable to workers. For example, grounds for dismissal are limited to those stipulated by law.

[ POINT ]
| | | |
|---|---|---|
| Basic matters | : | The Labor Code enacted in 1974 provides for employment-related matters in general, such as recruitment, rest periods, wages, social security, strikes, and termination of employment. The law is well designed to protect workers. |
| Work rules | : | Companies are not legally required to develop work rules. Companies develop work rules based on necessity, only to manage workers' activities. |
| Wages | : | Minimum wages are determined based on region and industry (agriculture or non-agriculture), and vary among regions (the differences in minimum wages between metropolitan regions and rural regions are significant, nearly double). |
| Dismissal | : | One of the characteristics of dismissal legislation in the Philippines is that the Labor Code stipulates Just Cause on the part of workers and Authorized Cause on the part of companies separately and stipulates dismissal procedures for each cause separately. |
| Visa | : | There are mainly 14 types of visas, among which Employment Visa and the Alien Employment Permit (AEP) issued by the Department of Labor and Employment have business importance. |

## ▶ Singapore

It is important to note that the labor law in Singapore was significantly amended on 1 April 2019 and that all employees are now covered by the Employment Act.

[ POINT ]
| | | |
|---|---|---|
| Basic matters | : | Labor laws in Singapore are designed substantially favorable to companies and have the following features: justifiable grounds for dismissal are not required; large retirement allowances are not required; and minimum wages are not specified. |
| Work rules | : | There is no legal obligation on companies to develop work rules. |
| Wages | : | Companies are not required to pay overtime pay to Workmen whose basic wages exceed SGD 4,500 per month or to workers other than Workmen whose basic wages exceed SGD 2,600 per month. |
| Dismissal | : | Generally Singapore labor law is characterised by enabling companies to dismiss their employees without justifiable reasons (ordinary dismissal). Companies are not required to pay retirement allowances to employees in excess of what is stipulated in the individual employment contract. |
| Visa | : | Japanese expatriates generally apply for an Employment Pass. |

## ▶ Thailand

As the employment turnover rate in Thailand is high, many Japanese firms misunderstand that it is easy to dismiss employees under Thailand labor laws; however, dismissal requires justifiable grounds in addition to compliance with statutory procedures. Therefore, it is not easy to dismiss employees under Thailand labor laws.

[ POINT ]
| | | |
|---|---|---|
| Basic matters | : | Basic rules regarding working hours, leave and more are stipulated in the Labor Protection Act. |
| Work rules | : | Employers that employ ten or more workers are required to develop work rules in the Thai language. |
| Wages | : | Though it is slightly different from retirement allowances, companies are required to pay severance pay to employees upon dismissal. |
| Dismissal | : | Ordinary dismissal requires justifiable reasons, in addition to a notice on or before the due date of wage payment preceding the scheduled date of dismissal and severance pay. |
| Visa | : | A worker wishing to work in Thailand must obtain a business (B) visa and work permit. |

## ▶ Vietnam

In Vietnam, which is a socialist country, workers are well protected and there are restrictions on the grounds for dismissal. Labor disputes are often determined more favourably for workers.

[ POINT ]
| | | |
|---|---|---|
| Basic matters | : | matters: Basic labor-related matters are stipulated in the Labor Code 2012, however, there are many subordinate regulations. Therefore, it is necessary for a company to confirm whether any new subordinate regulations have been issued when it intends to impose any disposition which could be disadvantageous to workers. |
| Work rules | : | Employers that employ ten or more employees are required to develop work rules. Applicable companies must, within ten days after announcing its work rules, submit them to the state-level labor authorities, together with the minutes indicating that the company has held discussions with the trade union and documents that prescribe the company's grounds for disciplinary action. |
| Wages | : | Companies must develop a competency-based wage table which complies with the rules, such as setting minimum wages higher than the regional minimum wages and setting wages by job classification or grade. |
| Dismissal | : | Dismissal is permitted only in very limited circumstances. If any labor dispute arises after a worker is dismissed, it is often decided in favor of the worker. Therefore, companies need to be careful about procedures when dismissing workers. |
| Visa | : | Foreign workers may be employed for jobs which cannot be performed by locals. In order to work in Vietnam, foreign workers are required to obtain a visa and work permit. |

## ▶ India

It is noteworthy that India has federal laws and state laws enacted by the states, both of which must be complied with.

[ POINT ]
| | | |
|---|---|---|
| Basic matters | : | The labor law structure in India is extremely complicated. It is noteworthy that under federal laws non-supervisors (Workmen) are protected in terms of working hours, restrictions on dismissal, allowances for overtime and holidays, etc., however, supervisors (Non-Workmen) are generally not protected. |
| Work rules | : | Generally companies are not required to develop work rules, however, it is common for companies to develop a code of conduct concerning terms of employment applicable to all workers (attendance, leaving office, leave, grounds for disciplinary action, and others) and stipulate "other working conditions shall be pursuant to the provisions of the code of conduct" in individual agreements. |
| Wages | : | Wages, bonuses, overtime pay, and Workmen's minimum wages vary from state to state and are revised every year. The government has been working on integrating and simplifying major labor-related laws including the Minimum Wages Act, the Payment of Wages Act, the Payment of Bonus Act and the Equal Remuneration Act. |
| Dismissal | : | Under federal laws, the protection of Workmen working in certain industrial establishments has been strengthened. When dismissing a worker, companies are required to follow statutory procedures and pay statutory compensation. |
| Visa | : | Foreign nationals wishing to live and work in India must obtain a work visa. |

## ▶ Australia

Both state-specific laws and federal laws (the Fair Work Act) apply to labor-management relations. Therefore, companies are required to comply with both sets of laws.

[ POINT ]
| | | |
|---|---|---|
| Basic matters | : | The Fair Work Act is Australia's main labor law. Non-compliance with the Fair Work Law may result in severe punishment, etc. |
| Work rules | : | Companies are required to develop work rules but are not required to submit them to the relevant government authorities. |
| Wages | : | Minimum wages are determined by age, form of employment, qualifications, and the weight of responsibilities. |
| Dismissal | : | There are minimum periods of notice at termination set out in the National Employment Standards. |
| Visa | : | Due to a major amendment, the 457 visa, which had been generally regarded as the most versatile visa for Japanese companies, was completely abolished and replaced with a new working visa (TSS). |

## ▶ New Zealand

It is noteworthy that New Zealand has flexible employment laws regulated by a combination of statute and common law and that sometimes federal case law in Australia and the United Kingdom have importance.

[ POINT ]
| | | |
|---|---|---|
| Basic matters | : | The Employment Relations Act governs all types of standard employment relationships, whether individual, collective or fixed-term. |
| Work rules | : | Companies are not legally required to develop work rules. |
| Wages | : | Companies need to pay close attention to the annual revision of minimum wages. |
| Dismissal | : | Justifiable grounds and prior notice are required for dismissal. |
| Visa | : | Foreign nationals wishing to work in New Zealand must obtain a work visa. |

## Opinions from the Field

# Cooperation & Advisory

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After joining NTT DATA Corporation as one of its inaugural overseas recruits, he was engaged in management support for overseas subsidiaries. In 1997, he moved to Kuala Lumpur following the establishment of the Malaysia branch. After returning to Japan in 2001, he joined Hay Consulting Group (now Korn Ferry). With the launch of Japan Desk, he moved to Shanghai, China, in 2006, where he was responsible for a wide range of personnel consulting for Japanese companies. In 2010, he joined Aon Hewitt China. In 2016, he took a management role at IWNC China. In 2018, he joined PERSOL RESEARCH AND CONSULTING CO., LTD., where he assumed his current position in 2019.

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(Japan)
Executive Officer Vice President

Joined a leading life insurance company in 1997 as a new graduate. Joined Tempstaff Co., Ltd. (now Persol Tempstaff Co., Ltd.) in 2000. After working as a sales manager at multiple Tokyo locations from 2004, he moved to Jakarta as Vice President of PT. Tempstaff Indonesia (now PT. Intelligence HR Solutions Indonesia) in 2012. Served as CEO of the company from 2014. From 2016, he moved to PERSOLKELLY PTE. LTD. (Singapore), the Persol Group's APAC regional headquarters and worked as Regional Sales Director to comprehensively support personnel recruitment operations for global companies across 13 APAC countries and regions. He has held his current position as Executive Officer / Vice President since October 2019.

**Intelligence Anchor Consulting**
Vice President
**Yosuke Sudo**

Korea

China

**PERSOLKELLY Consulting KOREA**

Hong Kong

Taiwan

**PERSOL TAIWAN**
Country head &
General manager
**Toru Tuzuki**

India

Vietnam

Thailand

**PERSOLKELLY Consulting Limited (Hong Kong)**

Malaysia
Singapore

Indonesia

**PERSOLKELLY Consulting Sdn. Bhd.**
Managing Director & Business Head
**Anthony Raja Devadoss**

Australia

New Zealand

## PERSOL HR DATA BANK in APAC  https://rc.persol-group.co.jp/hr-data/en/

A one-stop website for information on the APAC labor market, including essential statistical information and wage data, information on labor legislation, survey results on employment and growth awareness in 13 countries and regions* across the Asia Pacific region (APAC), and more. In addition to labor market-related data, including basic information such as population and area as well as workforce numbers, working hours, wages, etc., the characteristics of labor laws in each country or region, the recent status of labor policies, notable points about labor laws from the perspective of labor management, etc., the results of the "APAC Labor Market Status Survey" independently conducted by PERSOL RESEARCH AND CONSULTING in 14 countries and regions (including Japan) are also posted here.
*China, Hong Kong, Korea, Taiwan, Indonesia, Malaysia, the Philippines, Singapore, Thailand, Vietnam, India, Australia and New Zealand.

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